Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT01	000	Applicant Tracking	Generate electronic and hard copy posting notices for positions to be filled.	Fit
AT02	000	Applicant Tracking	Provide ability to establish a new job posting by modifying a previous job posting	Fit
AT03	000	Applicant Tracking	Provide ability to designate a job posting for internal candidates only.	Fit
AT04	000	Applicant Tracking	Maintain applicant information for internal employees, former employees, and external applicants.	Fit
AT05	001	Applicant Tracking	Capture and maintain the following information associated with a job posting:	Fit
AT05	002	Applicant Tracking	Posting number = Job Requisition #	Fit
AT05	003	Applicant Tracking	Position number	Fit
AT05	004	Applicant Tracking	Class code	Fit
AT05	005	Applicant Tracking	Class title	Fit
AT05	006	Applicant Tracking	Functional title (programmatic)	Fit
AT05	007	Applicant Tracking	Position type (regular full-time, regular part-time, temporary full-time, temporary part-time, acting, returning retiree)	Fit
AT05	008	Applicant Tracking	Budgeted salary (group with steps, group with range, hourly)	Fit
AT05	009	Applicant Tracking	Posting waived indicator (Y/N)	Fit
AT05	010	Applicant Tracking	Status (filled, open, withdrawn, closed, processed)	Fit
AT05	011	Applicant Tracking	EEO class	Fit
AT05	013	Applicant Tracking	FLSA status	Fit
AT05	014	Position Control	Multiple combinations of account coding distribution(s):	Fit
AT05	015	Position Control	Organization	Fit
AT05	016	Position Control	Strategic Program	Fit
AT05	017	Position Control	Appropriation Year	Gap
AT05	018	Position Control	Capture and maintain the following information associated with a job posting: Method of Finance	Gap
AT05	019	Position Control	PCA (USAS Required)	Fit
AT05	020	Position Control	Agency Budget Category	Fit
AT05	021	Position Control	Contract (optional)	Fit
AT05	022	Position Control	Appropriation Number	Gap
AT05	023	Position Control	Fund	Fit
AT05	024	Position Control	Grant (optional)	Fit
AT05	025	Position Control	Project (optional)	Fit
AT05	026	Applicant Tracking	Location/facility code	Fit
AT05	027	Applicant Tracking	County code (where position is headquartered)	Fit
AT05	028	Applicant Tracking	Headquarters (city)	Fit
AT05	030	Applicant Tracking	Screening indicator (Y/N; to determine whether program will interview all or screen)	Fit
AT05	031	Applicant Tracking	Program contact person 1	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT05	032	Applicant Tracking	Program contact person 1 phone number	Fit
AT05	033	Applicant Tracking	Program contact person 1 email address	Fit
AT05	034	Applicant Tracking	Program contact person 2	Fit
AT05	035	Applicant Tracking	Program contact person 2 phone number	Fit
AT05	036	Applicant Tracking	Program contact person 2 email address	Fit
AT05	037	Applicant Tracking	Posting open date	Fit
AT05	038	Applicant Tracking	Posting close date	Fit
AT05	039	Applicant Tracking	Extend date	Fit
AT05	042	Applicant Tracking	Advertising costs	Fit
AT05	043	Applicant Tracking	System should capture and maintain the following information associated with a job posting: "Budget for posting"	Gap
AT05	044	Applicant Tracking	Actual costs	Fit
AT05	045	Applicant Tracking	Other costs (accessed from drop-down box)	Fit
AT05	046	Applicant Tracking	Organization/external recruiter costs	Fit
AT05	047	Applicant Tracking	Internal recruiter costs	Fit
AT05	048	Applicant Tracking	Travel costs	Fit
AT05	050	Applicant Tracking	Start date	Fit
AT05	051	Applicant Tracking	Withdrawal date	Fit
AT05	052	Applicant Tracking	System should capture and maintain the following information associated with a job posting: "Reason for withdrawal."	Gap
AT05	053	Applicant Tracking	Include shift on posting.	Fit
AT05	054	Applicant Tracking	Include general description of position duties	Fit
AT05	055	Applicant Tracking	Supervisor/selecting authority	Fit
AT05	058	Applicant Tracking	System should have the ability to capture responsible HR representative	Fit
AT05	060	Applicant Tracking	System must have the ability to track Open Until Filled positions	Fit
AT05	062	Applicant Tracking	System should capture and maintain the following information associated with a job posting: Ad Placement	Fit
AT05	063	Applicant Tracking	System should capture and maintain the following information associated with a job posting: Ad Placement Date and Duration	Fit
AT05	437	Applicant Tracking	Reserved for internal posting to PRS specific employees only indicator (Y/N; if Y, do not send to job line)	Fit
AT06	001	Applicant Tracking	Capture and maintain the following applicant information:	Modified Gap
AT06	002	Applicant Tracking	Social Security number (applicant/employee number)	Fit
AT06	003	Applicant Tracking	Applicant/employee name	Fit
AT06	005	Applicant Tracking	System should capture and maintain the following applicant information: Application status (declined, withdrawn, interviewed, not interviewed)	Gap
AT06	006	Applicant Tracking	Application receipt date (for non-automated applications)	Fit
AT06	007	Applicant Tracking	Application entry date (system-generated)	Fit
AT06	008	Applicant Tracking	Job posting numbers applied for	Fit
AT06	009	Applicant Tracking	Type of employment requested (full-time, part-time, summer, temporary/project)	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT06	010	Applicant Tracking	Date available for work	Fit
AT06	011	Applicant Tracking	Willingness to work hours other than 8-5? (Y/N)	Fit
AT06	012	Applicant Tracking	Willingness to work days other than Monday-Friday? (Y/N)	Fit
AT06	013	Applicant Tracking	Willingness to travel? (Y/N)	Fit
AT06	014	Applicant Tracking	Percent of time for travel	Fit
AT06	015	Applicant Tracking	Driver's license State and number	Fit
AT06	016	Applicant Tracking	Driver's license type	Fit
AT06	017	Applicant Tracking	Geographic preference	Fit
AT06	018	Applicant Tracking	Disclosure of felony conviction(s) (Y/N)	Modified Gap
AT06	019	Applicant Tracking	Description of felony conviction (dates and nature of offense, name and location of court, disposition of case)	Modified Gap
AT06	020	Applicant Tracking	Education-Basic	Fit
AT06	021	Applicant Tracking	Highest grade completed (1-12)	Fit
AT06	022	Applicant Tracking	Graduated or achieved GED (Y/N)	Fit
AT06	023	Applicant Tracking	Education-Higher Education	Fit
AT06	024	Applicant Tracking	Type of school (undergraduate, graduate, technical,vocational)	Fit
AT06	025	Applicant Tracking	Name and location of school	Fit
AT06	026	Applicant Tracking	Dates attended	Modified Gap
AT06	027	Applicant Tracking	Semester/clock hours completed	Modified Gap
AT06	028	Applicant Tracking	Graduated (Y/N)	Fit
AT06	029	Applicant Tracking	Expected graduation date	Fit
AT06	030	Applicant Tracking	Type of degree	Modified Gap
AT06	031	Applicant Tracking	Major/minor field of study	Fit
AT06	032	Applicant Tracking	Licenses/Certifications	Fit
AT06	033	Applicant Tracking	Description	Fit
AT06	034	Applicant Tracking	Date issued	Fit
AT06	035	Applicant Tracking	Issued by (State of other authority)	Fit
AT06	036	Applicant Tracking	License number	Fit
AT06	037	Applicant Tracking	Location of issuing authority (city and state)	Fit
AT06	038	Applicant Tracking	Special skills/qualifications	Fit
AT06	039	Applicant Tracking	Listing of all License/Certification Table	Fit
AT06	040	Applicant Tracking	Words per minute typing	Fit
AT06	041	Applicant Tracking	Sign language (Y/N)	Fit
AT06	042	Applicant Tracking	Certified interpreter (Y/N)	Fit
AT06	043	Applicant Tracking	Foreign Language (Y/N)	Fit
AT06	044	Applicant Tracking	What language?	Fit
AT06	045	Applicant Tracking	How fluently?	Fit
AT06	046	Applicant Tracking	Prior State of Texas service (Y/N)	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT06	047	Applicant Tracking	Agency(s)	Fit
AT06	048	Applicant Tracking	Ever retired from Texas state government?	Modified Gap
AT06	049	Applicant Tracking	Any relatives working for this agency?	Modified Gap
AT06	050	Applicant Tracking	Name(s)	Modified Gap
AT06	051	Applicant Tracking	Relationship(s)	Modified Gap
AT06	052	Applicant Tracking	City where employed	Modified Gap
AT06	053	Applicant Tracking	Military service	Fit
AT06	054	Applicant Tracking	Branch of service	Fit
AT06	055	Applicant Tracking	Dates of service (to/from)	Fit
AT06	056	Applicant Tracking	Capture and maintain the following applicant information: "Surviving spouse or orphan of veteran." [Y] [N]	Gap
AT06	057	Applicant Tracking	Employment history (multiple occurrences)	Fit
AT06	058	Applicant Tracking	Employer	Fit
AT06	059	Applicant Tracking	Position title	Fit
AT06	060	Applicant Tracking	Employer address	Modified Gap
AT06	061	Applicant Tracking	Employer telephone number	Fit
AT06	062	Applicant Tracking	Starting employment date	Fit
AT06	063	Applicant Tracking	Ending employment date	Fit
AT06	064	Applicant Tracking	Current/final salary	Fit
AT06	065	Applicant Tracking	Type of position (technical, non-managerial, or supervisory/managerial)	Modified Gap
AT06	066	Applicant Tracking	Immediate supervisor name	Modified Gap
AT06	067	Applicant Tracking	Immediate supervisor title	Modified Gap
AT06	068	Applicant Tracking	Immediate supervisor telephone number	Modified Gap
AT06	069	Applicant Tracking	If supervisor, number of employees supervised	Modified Gap
AT06	070	Applicant Tracking	Type of employment (full-time, part-time, summer, temporary/project)	Modified Gap
AT06	071	Applicant Tracking	Average number of hours worked per week	Modified Gap
AT06	072	Applicant Tracking	Summary of experience	Fit
AT06	073	Applicant Tracking	Reason for leaving	Modified Gap
AT06	075	Applicant Tracking	Date of birth	Fit
AT06	076	Applicant Tracking	Mailing address	Fit
AT06	077	Applicant Tracking	Physical address	Fit
AT06	078	Applicant Tracking	Home phone number	Fit
AT06	079	Applicant Tracking	Business phone number	Fit
AT06	080	Applicant Tracking	Email address	Fit
AT06	081	Applicant Tracking	Ethnicity	Fit
AT06	082	Applicant Tracking	Gender	Fit
AT06	084	Applicant Tracking	Capture and maintain the following applicant information: "Reference source code." (Drop-down box with common sources. "Other" selection requires entry of specific source)	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT06	086	Applicant Tracking	Recruiter ID	Fit
AT06	087	Applicant Tracking	Pre-screen indicator(Y/N)	Fit
AT06	088	Applicant Tracking	Pending documents codes/comments	Fit
AT06	089	Applicant Tracking	Pre-screen class code	Fit
AT06	090	Applicant Tracking	Pre-screen comments	Fit
AT06	092	Applicant Tracking	ABLE test	Fit
AT06	093	Applicant Tracking	alcohol and drug test	Fit
AT06	095	Applicant Tracking	Fitness for Duty Assessment test	Fit
AT06	097	Applicant Tracking	System must have capability to track panel interview indicators	Fit
AT06	098	Applicant Tracking	Willingness to Telecommute?(Y/N)	Modified Gap
AT06	099	Applicant Tracking	System should have the ability to track the number of hours an applicant has in a specific course (ex: computer science , accounting, etc.)	Modified Gap
AT06	100	Applicant Tracking	System should provide means to track applicant's experience using personal computers	Fit
AT06	101	Applicant Tracking	Selective service indicator	Modified Gap
AT06	102	Applicant Tracking	Forwarded to Hiring Authority	Fit
AT06	104	Applicant Tracking	Transcripts Y or N	Fit
AT06	105	Applicant Tracking	Volunteer/Intern	Fit
AT07	001	Applicant Tracking	Capture and maintain the following information associated with an offer:	Fit
AT07	002	Applicant Tracking	Social Security number (employee number)	Fit
AT07	003	Applicant Tracking	Employee name	Fit
AT07	004	Applicant Tracking	Effective (notification) date	Fit
AT07	005	Applicant Tracking	Salary group / actual salary	Fit
AT07	006	Applicant Tracking	Pending documents (transcript)	Fit
AT07	007	Applicant Tracking	Temporary employee indicator (Y/N)	Fit
AT07	008	Applicant Tracking	Temporary employment start date	Fit
AT07	009	Applicant Tracking	Temporary employment end date	Fit
AT07	010	Applicant Tracking	HRIS reason code	Fit
AT07	011	Applicant Tracking	Drug testing	Fit
AT07	012	Applicant Tracking	Posting number	Fit
AT07	013	Applicant Tracking	Supervisor/contact person	Fit
AT08	001	Applicant Tracking	Provide and edit to ensure that a position is automatically closed when the position close date is met unless close date is extended.	Fit
AT08	002	Applicant Tracking	System should not automatically close position on the earliest possible close date, but should hold positions open until closed by request of the hiring authority.	Fit
AT08	003	Applicant Tracking	System should provide an "edit" to prompt Human Resources to update the agency's internet jobs page, the Governor's Job Bank and any other recruitment sites used when a vacant position is initially posted, extended or closed.	Gap
AT09	000	Applicant Tracking	Provide ability for applicants to establish and maintain multiple electronic job applications through the use of an industry-standard web browser, to direct an application to different job postings, and to check the status of an application.	Gap

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AT10	000	Applicant Tracking	Provide ability to scan hard-copy job applications.	Gap
AT11	000	Applicant Tracking	Allow for attaching documents created using industry-standard office suite applications to electronic job applications.	Gap
AT12	000	Applicant Tracking	Provide ability to optionally perform an automated comparison of position minimum requirements for education and experience to qualifications of available applicants for a position, and generate a list of potential candidates to be considered for hiring.	Fit
AT13	000	Applicant Tracking	Automatically update application statuses to reflect the selection of applicants for an open position.	Fit
AT14	000	Applicant Tracking	Generate custom interview and notification letters to inform applicants of the status of a position or his/her status as an applicant (application received, notice that agency was unable to contact applicant, position filled, offer letter, posting withdrawn).	Fit
AT14	001	Applicant Tracking	Application received	Fit
AT14	002	Applicant Tracking	Notice that agency was unable to contact applicant	Fit
AT14	003	Applicant Tracking	Position filled	Fit
AT14	004	Applicant Tracking	Offer letter	Fit
AT14	005	Applicant Tracking	Posting withdrawn	Fit
AT14	007	Applicant Tracking	Record date	Fit
AT14	008	Applicant Tracking	Type of notice	Fit
AT15	000	Applicant Tracking	Carry forward new hire information obtained through application process to eliminate redundant data entry.	Fit
AT17	000	Applicant Tracking	Provide ability to optionally distribute job postings through the Agency's electronic mail system.	Gap
AT19	000	Applicant Tracking	Maintain historical applicant information and allow accessibility to applicant history based on SSN, name and PIN.	Fit
AT21	001	Applicant Tracking	Provide ability to search and analyze applicants based on:	Fit
AT21	002	Applicant Tracking	Education, past experience, skills, and other applicant information	Fit
AT21	003	Applicant Tracking	Past employee performance history	Fit
AT21	004	Applicant Tracking	Results of reference checks and skills tests	Fit
AT21	005	Applicant Tracking	Weighted rankings of candidates	Fit
AT21	006	Applicant Tracking	Work location	Fit
AT21	007	Applicant Tracking	Interest in full-time or part-time employment	Fit
AT21	008	Applicant Tracking	Interest in temporary or permanent employment	Fit
AT21	009	Applicant Tracking	Availability	Fit
AT21	010	Applicant Tracking	Veteran's status	Fit
AT21	011	Applicant Tracking	Languages spoken and proficiency level	Fit
AT21	012	Applicant Tracking	Attained license or certification (if applicable)	Fit
AT21	013	Applicant Tracking	Affirmative action criteria	Fit
AT21	014	Applicant Tracking	Maintain the information listed above until applicant is hired or application is deemed obsolete. Table of "obsolete dates" should be indexed by type of position and/or by salary range. (secretaries would be obsolete in 6 months while accounting managers may not be considered obsolete for 9 months, etc.)	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT21	015	Applicant Tracking	System should maintain the applicant information until applicant is hired or application is deemed obsolete. Applications should be considered obsolete if the last application activity was more than 2 years ago. State law requires that all applications be kept for 2 years. When the hard copy is purged at 25 months, the system should move the application information to an inactive, archived status.	Fit
AT22	000	Applicant Tracking	Provide ability to capture and report on all Affirmative Action data required for applicant tracking purposes.	Fit
AT23	000	Applicant Tracking	Provide for automated screening of applications to determine which jobs a prior agency applicant appears qualified to fill, and allow for generating an "invitation to apply" letter.	Fit
AT24	000	Applicant Tracking	Provide ability to discontinue active status for an applicant if the State or the applicant rejects employment after a specified number of times.	Fit
AT25	000	Applicant Tracking	Support the documentation of required certifications upon hiring.	Fit
AT26	000	Applicant Tracking	Support tracking of drug testing results from interview and thereafter on applicants for selected positions.	Fit
AT26	200	Applicant Tracking	Qualified applicants for a given job posting	Fit
AT26	201	Applicant Tracking	Applicants rejected	Fit
AT26	202	Applicant Tracking	Job postings closed by closed date	Fit
AT27	000	Applicant Tracking	Support tracking the results of criminal checks for certain positions.	Fit
AT28	000	Applicant Tracking	Support multiple interview and notification processes for a single applicant simultaneously (two programs within the agency recruiting a single applicant).	Fit
AT30	000	Applicant Tracking	Provide ability to process applicants not having an assigned SSN and assign a unique system-generated, non-SSN tracking number.	Fit
AT31	000	Applicant Tracking	Provide ability to track applicants Selective Service registration.	Modified Gap
AT31	011	Applicant Tracking	Include standard reports that calculate adverse impact related to hiring, merit awarding, promotion, and termination.	Fit
AT32	001	Applicant Tracking	Provide standard production reports that allow for monitoring all aspects of the applicant placing and tracking function, including:	Fit
AT32	002	Applicant Tracking	Applications received for a given job posting	Fit
AT32	003	Applicant Tracking	Applicants hired	Fit
AT32	006	Applicant Tracking	Mailing labels	Fit
AT32	007	Applicant Tracking	Open posting report	Fit
AT32	008	Applicant Tracking	Qualified applicants for a given job posting	Fit
AT32	009	Applicant Tracking	Applicants rejected	Fit
AT32	010	Applicant Tracking	Job postings closed by closed date	Fit
AT33	000	Applicant Tracking	An application may have a job referral source (how the applicant learned about the job) linked to it.	Fit
AT34	000	Applicant Tracking	Applicant name	Fit
AT34	001	Applicant Tracking	Job Posting	Fit
AT34	002	Applicant Tracking	Application Date	Fit
AT34	003	Applicant Tracking	Referral (applications to supervisor) Date	Fit
AT34	004	Applicant Tracking	Outcome	Fit
AT34	005	Applicant Tracking	Agency Job Classification	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
AT35	000	Applicant Tracking	The system shall link test(s) to one or more job classifications	Fit
AT36	000	Applicant Tracking	The system shall maintain separate test section scores as well as overall test scores.	Fit
AT37	000	Applicant Tracking	The system shall record relevant data about interviews.	Fit
AT38	000	Applicant Tracking	The system shall provide for automatic scheduling of testing for applicants.	Fit
AT39	000	Applicant Tracking	The system shall allow for the entry of a "request to fill" initiated by an authorized selecting authority.	Gap
AT40	000	Applicant Tracking	The system shall allow for the efficient transfer of essential job functions required for a job posting to a format for use as a job announcement for newspaper printing and/or posting on the DHS Internet Home Page.	Fit
AT41	000	Applicant Tracking	The system shall link job classification information with the position and the job posting in order to associate the essential job functions, minimum qualifications and other position information with the job announcement/posting.	Fit
AT42	000	Applicant Tracking	The system shall provide the capability to fill multiple positions with a single job posting notice.	Gap
AT43	000	Applicant Tracking	The system shall provide for and track the selection/non-selection of all applicants for each posting.	Fit
AT45	000	Applicant Tracking	The system shall provide the capability of easily electronically redirecting one or more applicants for one job posting to a different job posting.	Gap
AT47	000	Applicant Tracking	Unsuccessful applicants for a position will be automatically coded as 'non-selectees' once a selection has been entered on the system. Should be able to override this function by the posting type.	Fit
AT48	000	Applicant Tracking	Outcome codes (letter codes) will be entered on an exception basis.	Fit
BA01	001	Base Benefits	Provide functionality for maintaining all data elements and processes required for administering the State's Group Insurance program for employees:	Fit
BA01	002	Base Benefits	Insurance	Fit
BA01	003	Base Benefits	Retirement	Fit
BA01	004	Base Benefits	Premium conversion	Fit
BA01	005	Base Benefits	TexFlex health care reimbursement account	Fit
BA01	006	Base Benefits	TexFlex dependent care reimbursement account	Fit
BA01	007	Base Benefits	TexaSaver 401(k) account (not currently tracked in IEBS)	Fit
BA01	008	Base Benefits	TexaSaver 457 account (not currently tracked in IEBS)	Gap
BA01	009	Payroll Administration	Texas Protects optional whole life insurance (not currently tracked in IEBS)	Fit
BA01	200	Base Benefits	SKIP should be included as a part of insurance.	Gap
BA01	201	Base Benefits	Include 403(b) Tax Sheltered Annuity.	Fit
BA01	208	Base Benefits	Short-term disability	Fit
BA01	209	Base Benefits	Long-term disability	Fit
BA01	210	Base Benefits	FMLA	Fit
BA01	211	Time, Labor, & Leave A	Worker's Compensation	Modified Gap
BA01	212	Base Benefits	Retirement Applications	Fit
BA02	001	Base Benefits	Provide for processing the following group benefits eligibility events:	Fit
BA02	002	Base Benefits	Establishment and maintenance of participant information	Fit
BA02	003	Base Benefits	Activation of coverage for participant, spouse, and non-spouse dependents	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
BA02	006	Base Benefits	Initiation of COBRA processing when a participant's coverage is terminated due to a COBRA qualifying event	Fit
BA02	007	Base Benefits	Processing of evidence of insurability	Fit
BA02	008	Personnel Management	Initiation of and return from leave of absence	Fit
BA02	009	Base Benefits	Processing of new hires and rehires	Fit
BA02	010	Base Benefits	Processing of terminating/retiring employees	Fit
BA02	011	Base Benefits	Processing of return to work retirees	Fit
BA02	012	Base Benefits	Termination of coverage for participant, spouse, and non-spouse dependents as group or as individual events	Fit
BA02	013	Base Benefits	Processing of participant transfers to/from the agency	Fit
BA02	014	Payroll Administration	Medical Trust Fund eligibility	Fit
BA03	001	Payroll Administration	Provide for the following financial processes associated with group benefits administration:	Gap
BA03	002	Payroll Administration	Preparation of journal voucher for monthly estimate of retirement matching paid from agency funds.	Modified Gap
BA03	003	Payroll Administration	Preparation of journal voucher for retirement matching for any service purchase contributions (retirement buybacks) made by agency employees	Modified Gap
BA03	004	Payroll Administration	Preparation of journal voucher for monthly estimate of employee insurance premiums and SKIP paid from agency funds.	Modified Gap
BA04	001	Base Benefits	Maintain the following for deferred compensation plans:	Fit
BA04	003	Base Benefits	Edit for maximum annual deferral for individual 401(k) and 457 programs	Modified Gap
BA04	004	Base Benefits	Edit for maximum annual deferral when participating in both plans	Modified Gap
BA04	005	Base Benefits	Edit to enforce catch-up provision (when applicable) - 457 and 403(b)	Modified Gap
BA04	006	Payroll Administration	401(k) loan activity	Fit
BA04	008	Base Benefits	Record of hardship withdrawal information	Modified Gap
BA04	223	Base Benefits	Add 403(b) Program.	Fit
BA05	000	Base Benefits	Maintain complete benefits transaction history by employee.	Fit
BA10	000	Base Benefits	Allow for the establishment and maintenance of multiple plan Providers.	Fit
BA12	000	Base Benefits	Provide ability to effective date all changes to benefit rates and enrollment information.	Fit
BA14	000	Base Benefits	Provide ability to establish appropriate qualifying events that will initiate COBRA processing, and should generate standard letters notifying employee of COBRA eligibility.	Fit
BA14	228	Base Benefits	The system should automatically notify dependents for COBRA processing and generate standard letters notifying dependents of COBRA eligibility.	Fit
BA16	000	Base Benefits	Provide ability to track refunds and collections of premiums.	Fit
BA18	000	Base Benefits	Support "integrated benefits" for retired ERS state employees returning to work in another State job when the retiree participates in the defined benefits plan or has disability retirement. Ensure that deductions are not taken for retirement or insurance; however, rehired retiree may participate in the 401(k), 403(b) and 457 deferred compensation programs and the Texas Protects optional whole life insurance program and the TexFlex Health Care Reimbursement Accoutns (HCRA) and the TexFlex Dependant Care Reimbursement Accounts (DCRA).	Modified Gap
BA18	233	Base Benefits	Add 403(b) Program.	Fit
BA19	000	Base Benefits	Allow for retaining employee data and enabling employee re-activation of his/her insurance for a user-defined period after employee separates from State.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
BA20	000	Base Benefits	Provide edit to ensure that employees working 20 hours or more per week receive the full State contribution for insurance, while employees working less than 20 hours receive 50% of the full State contribution.	Fit
BA21	000	Base Benefits	Provide an annual fiscal year-end rollover of coverage with new premiums, state contributions, and new insurance salaries.	Modified Gap
BA22	000	Payroll Administration	BA22 000: Provide for an annual calendar year-end rollover of 401(k), 403(b) and 457 deferred compensation plans.	Gap
BA24	236	Base Benefits	All group insurance coverage and premiums. Including employee share, state share and skip.	Modified Gap
BA24	237	Base Benefits	Premium Conversion coverage and premium.	Fit
BA24	238	Base Benefits	Both the TexFlex health care reimbursement account and dependent care reimbursement accounts coverage and premiums.	Fit
BA24	239	Base Benefits	Personal payments.	Fit
BA24	240	Base Benefits	Adjustments to all of the above.	Fit
BA25	241	Base Benefits	System should provide ability to establish and maintain any and all insurance, premium conversion, TexFlex and TexaSaver edits required to provide accurate and timely payroll deductions.	Modified Gap
BA26	001	Base Benefits	For kidney transplant candidates, need ability to track the employee's transition from "normal" health insurance to Medicare; set up a one year time limit "tickler" (so that we can begin the transitional paperwork to get the employee back onto his/her former insurance coverage prior to the expiration of his/her one year of Medicare coverage); track the Medicare insurance information (to assist the emplyee with billing inquiries, etc.); and maintain this information in history for an unspecified time.	Gap
ER01	000	Employee Relations	Track disciplinary action identified by type of discipline, and Provide for monitoring of disciplinary action. Provide ability to track an unlimited number of disciplinary actions for each employee record (letter of reprimand, suspension, demotion, termination), establish/maintain steps in the disciplinary process, effective dates, explanation of reason for disciplinary action (in free-form format), policy violated, and other comments associated with each action.	Fit
ER01	266	Employee Relations	Add the MHMR Positive Performance disciplinary program steps and actions.	Fit
ER02	000	Employee Relations	Support entry and monitoring of appeals associated with employee disciplinary actions. Provide ability to maintain an unlimited number of appeals for each employee record (including appeal filing date), establish/maintain steps in the appeal process, effective dates, and comments associated with each appeal.	Fit
ER03	001	Employee Relations	Maintain additional data associated with disciplinary appeals as follows:	Fit
ER03	002	Employee Relations	Disciplinary action history (all steps in appeal process to date)	Fit
ER03	003	Employee Relations	Appeal date and time	Fit
ER03	004	Employee Relations	Appeal location	Fit
ER03	005	Employee Relations	Description of circumstances	Fit
ER03	006	Employee Relations	Hearing officer	Fit
ER03	007	Employee Relations	Case number (internal or external)	Fit
ER03	008	Employee Relations	Decision(s) made	Fit
ER03	009	Employee Relations	Settlement made	Fit
ER03	010	Employee Relations	Settlement responsible party	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ER04	001	Employee Relations	Support entry and monitoring of grievances in accordance with the agency policy. Provide ability to maintain an unlimited number of grievances for each employee record (including grievance filing date and description of circumstances) and establish/maintain steps in the grievance process, effective dates, policy or procedure allegedly violated, and comments associated with each grievance.	Fit
ER05	000	Employee Relations	Support the entry and monitoring of complaints to ensure employees receive fair and equitable treatment. Provide ability to maintain an unlimited number of complaints for each employee record (including complaint filing date and description of circumstances) and establish/maintain steps in the complaint process, effective dates, and comments associated with each complaint, also capture name of employee filing grievance and name of employee that grievance is filed against.	Gap
ER05	200	Employee Relations	This requirement should track both internal and external complaints separate from the grievance panels. PeopleSoft has Grievance pages in Manage Labor Relations for tracking grievances filed by employees and applicants. The majority of the HHSC agencies allow employees to file both grievances and complaints – with a clear distinction as to what personnel actions meet the criteria for the complaint or grievance process.	Gap
ER05	201	Employee Relations	System should support the entry and monitoring of Administrative, Management Initiated Investigations, Employment Discrimination, Client Complaints under Title VI complaints and grievances to ensure employees receive fair and equitable treatment. System should provide ability to maintain an unlimited number of complaints for each employee record (including complaint filing date and description of circumstances) and establish/maintain steps in the complaint process, effective dates, and comments associated with each complaint. System should also capture name of employee filing grievance and name of employee that grievance is filed against. System should include information related to name, position number and title, gender, race, etc.,	Fit
ER06	000	Employee Relations	Provide that all information associated with complaints are accessible only by authorized staff in the Office of Equal Opportunity or other properly authorized TDH staff as identified by executive management.	Fit
ER07	000	Employee Relations	Allow for automated tracking of employee performance evaluation reviews.	Fit
ER08	000	Employee Relations	Provide ability to establish and maintain an unlimited number of performance evaluations for each employee record as well as the dates that future performance evaluations are due (for possible future use).	Fit
ER09	001	Employee Relations	Track occupational illness, injury and accident history and associate to worker's compensation:	Fit
ER09	002	Employee Relations	Name of injured employee	Fit
ER09	003	Employee Relations	Employee number (SSN)	Fit
ER09	004	Employee Relations	Employee home address (including zip+4 code)	Fit
ER09	005	Employee Relations	Employee home phone number	Fit
ER09	006	Employee Relations	Employee work address	Fit
ER09	007	Employee Relations	Employee work phone number	Fit
ER09	008	Employee Relations	Date of birth	Fit
ER09	009	Employee Relations	Sex	Fit
ER09	010	Employee Relations	Marital status	Fit
ER09	011	Employee Relations	Spouse's name (if applicable)	Fit
ER09	012	Employee Relations	Number of dependent children	Fit
ER09	013	Employee Relations	Does employee speak English? (Y/N)	Fit

|---|---|---|---|---|
ER09	014	Employee Relations	Doctor's name	Fit
ER09	015	Employee Relations	Doctor's phone number	Fit
ER09	016	Employee Relations	Doctor's mailing address	Fit
ER09	017	Employee Relations	Date of employment	Fit
ER09	018	Employee Relations	Job classification code	Fit
ER09	019	Employee Relations	Rate of pay	Fit
ER09	020	Employee Relations	Date of hire	Fit
ER09	021	Employee Relations	Length of service in current position	Fit
ER09	022	Employee Relations	Position status (full-time, part-time, hourly)	Fit
ER09	023	Employee Relations	Date of incident	Fit
ER09	024	Employee Relations	Time of incident	Fit
ER09	025	Employee Relations	Reported to supervisor?	Fit
ER09	026	Employee Relations	Reported to Human Resources?	Fit
ER09	027	Employee Relations	Reported to State Office of Risk Management?	Fit
ER09	028	Employee Relations	Location where injury/exposure occurred	Fit
ER09	029	Employee Relations	Was employee performing his/her regular job activities when injury occurred? (Y/N)	Fit
ER09	030	Employee Relations	Description of incident	Fit
ER09	031	Employee Relations	Extent of injury (pre-defined choices displayed using drop-down boxes)	Fit
ER09	032	Employee Relations	Category (pre-defined choices displayed using drop-down box)	Fit
ER09	034	Employee Relations	Activity engaged in by injured at time of injury (pre-defined choices displayed using drop-down box)	Fit
ER09	035	Employee Relations	Body part(s) injured (pre-defined choices displayed using multiple drop-down boxes)	Fit
ER09	036	Employee Relations	Type of injury (pre-defined choices displayed using drop-down box)	Fit
ER09	037	Employee Relations	Type of occurrence (pre-defined choices displayed using drop-down box)	Fit
ER09	039	Employee Relations	Act/practice associated with occurrence (pre-defined choices displayed using drop-down box)	Fit
ER09	040	Employee Relations	Condition (physical hazard) associated with occurrence (pre-defined choices displayed using drop-down box)	Fit
ER09	041	Employee Relations	Did State or Agency have safety rule, regulation, or standard that would have prevented the occurrence? (Y/N)	Fit
ER09	042	Employee Relations	Was the rule, regulation, or standard violated?	Fit
ER09	044	Employee Relations	Action(s) taken or planned to prevent recurrence (pre-defined choices displayed using drop-down box)	Fit
ER09	045	Employee Relations	Did employee die from injury? (Y/N)	Fit
ER09	046	Employee Relations	Employee's election regarding use of accumulated sick leave	Fit
ER09	047	Employee Relations	Was employee granted extended sick leave? (Y/N) If yes, how many hours?	Fit
ER09	048	Employee Relations	Was employee granted sick leave from the sick leave pool? (Y/N) If yes, how many hours?	Fit
ER09	049	Employee Relations	Has injury been reported to Employee Insurance Unit?	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ER09	050	Employee Relations	Is employee eligible for leave under the Family Medical Leave Act?	Fit
ER09	051	Employee Relations	Is employee covered by disability plan?	Fit
ER09	052	Employee Relations	Witnesses to injury	Fit
ER09	053	Employee Relations	Treatment (multiple treatments and dates of treatments)	Fit
ER09	054	Employee Relations	Lost time periods (multiple)	Fit
ER09	055	Employee Relations	Number of days lost	Fit
ER09	056	Employee Relations	Aggregate total per incident	Fit
ER09	057	Employee Relations	Total lost time per employee	Fit
ER09	058	Employee Relations	Actual or expected return to work date	Fit
ER09	059	Employee Relations	Costs associated with lost days	Fit
ER09	243	Employee Relations	Organization/unit	Fit
ER09	244	Employee Relations	Supervisor's name and phone number	Fit
ER09	245	Employee Relations	Checkbox for "possible subrogation"	Gap
ER09	246	Employee Relations	Claim number	Fit
ER09	247	Employee Relations	Employee leave balances from SORM 80	Fit
ER09	248	Employee Relations	Employee emergency contact and number.	Fit
ER10	000	Employee Relations	Provide ability to generate Employer's Wage Statement (TWCC-1 & 3) for submission to the State Office of Risk Management.	Fit
ER11	000	Employee Relations	Provide ability to complete and transmit required Texas Workers' Compensation Commission forms to the State Office of Risk Management through "fax on demand" function.	Gap
ER12	000	Employee Relations	Provide ability to accumulate employee "retention points" to be used when determining layoffs during a reduction in force. Points will be calculated for employees by assigning values for pre-determined factors such as total State service, total TDH service, total program service, performance, and veterans' preference.	Fit
ER13	001	Employee Relations	Provide ability to capture and maintain exit interview information as follows:	Gap
ER13	002	Employee Relations	Employee name	Fit
ER13	003	Employee Relations	Supervisor (system-generated)	Fit
ER13	004	Employee Relations	Exit interview conducted by	Fit
ER13	005	Employee Relations	Organization (system-generated)	Fit
ER13	006	Employee Relations	Salary at termination (system-generated)	Fit
ER13	007	Employee Relations	Date hired (system-generated)	Fit
ER13	008	Employee Relations	Date separated	Fit
ER13	009	Employee Relations	Job classification title (system-generated)	Fit
ER13	010	Employee Relations	Type of termination (voluntary resignation, dismissal, layoff, retirement, resignation in lieu of termination, other)	Fit
ER13	011	Employee Relations	Reason for termination (list most common reasons and allow write-in of others)	Fit
ER13	012	Employee Relations	Resignation letter received from program (if applicable)? Y/N	Modified Gap
ER13	013	Employee Relations	Use of remaining annual leave balance (extend termination date on payroll, paid lump sum, transfer to receiving state agency, not eligible)	Fit
ER13	014	Employee Relations	Forwarding address	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ER13	015	Employee Relations	Transferring to another state agency? Agency?	Modified Gap
ER13	016	Employee Relations	Date of transfer (if applicable)	Fit
ER13	017	Employee Relations	Retirement contributions to be refunded to you? (Y/N/Retiring)	Fit
ER13	018	Employee Relations	If retiring, has ERS been notified of pending retirement?	Fit
ER13	019	Employee Relations	Does employee have health care reimbursement and/or dependent care reimbursement account? If yes, how much additional deduction from final paycheck?	Fit
ER13	020	Employee Relations	Has employee contacted Employee Insurance Unit re benefits continuation?	Fit
ER13	021	Employee Relations	If leaving State employment, do you want to donate remaining sick leave to sick leave pool? (Y/N/NA)	Fit
ER13	022	Employee Relations	Cleared on the following items?	Fit
ER13	023	Employee Relations	State property (Y/N/NA)	Fit
ER13	024	Employee Relations	Department keys (Y/N/NA)	Fit
ER13	025	Employee Relations	Telephone credit card (Y/N/NA)	Fit
ER13	026	Employee Relations	Building access card (Y/N/NA)	Fit
ER13	027	Employee Relations	Library books (Y/N/NA)	Fit
ER13	028	Employee Relations	Business cards (Y/N/NA)	Fit
ER13	029	Employee Relations	Agency letterhead (Y/N/NA)	Fit
ER13	030	Employee Relations	Identification card (Y/N/NA)	Fit
ER13	031	Employee Relations	Travel advances (Y/N/NA)	Fit
ER13	032	Employee Relations	Corporate travel card (Y/N/NA)	Fit
ER13	033	Employee Relations	Computer password terminated (Y/N/NA)	Fit
ER13	034	Employee Relations	Educational obligations (Y/N/NA)	Fit
ER13	035	Employee Relations	Stipends (Y/N/NA)	Fit
ER13	036	Employee Relations	Loans outstanding (Y/N/NA)	Fit
ER13	037	Employee Relations	Contracted obligations (Y/N/NA)	Fit
ER13	038	Employee Relations	Sick leave pool / extended sick leave obligation (Y/N/NA)	Fit
ER13	268	Employee Relations	System should provide ability to capture and maintain exit interview information as follows:*	Fit
ER13	269	Employee Relations	Add to list: Health & Dental Insurance ID cards, Handbooks & Software, Case Folders, Procurement Credit Cards, and Corporate Charge Cards.	Fit
ER13	270	Employee Relations	Include Information Services exit/security requirement (LAN Access, Telephone and etc.).	Fit
ER14	001	Employee Relations	Capture exit interview evaluation ratings as follows:	Modified Gap
ER14	002	Employee Relations	Communications received from supervisor	Modified Gap
ER14	003	Employee Relations	Communications with supervisor	Modified Gap
ER14	004	Employee Relations	Supervisor ratings (list criteria to be rated)	Modified Gap
ER14	005	Employee Relations	Were your education, skills, and abilities recognized and utilized?	Modified Gap
ER14	006	Employee Relations	Were you satisfied with the opportunities for advancement?	Modified Gap
ER14	007	Employee Relations	Do you believe that, after being hired, you received proper training/instructions for your position?	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ER14	008	Employee Relations	What were problem areas in your training program (list common problems)?	Modified Gap
ER14	009	Employee Relations	Do you feel that you received a competitive salary for job duties you performed?	Modified Gap
ER14	010	Employee Relations	Do you consider your fringe benefits satisfactory?	Modified Gap
ER14	011	Employee Relations	What did you like most about your job (list choices)?	Modified Gap
ER14	012	Employee Relations	What did you least like about your job (list choices)?	Modified Gap
ER14	013	Employee Relations	Suggestions for improving workplace	Modified Gap
ER14	271	Employee Relations	Add "but not limited to:" to end of sentence.	Modified Gap
ER14	272	Employee Relations	Include SB799 Requirements.	Modified Gap
ER15	001	Employee Relations	Provide ability to perform exit interview activities on non-employees (contractors) that have worked with the agency for six (6) months.	Fit
ER96	200	Employee Relations	The system should include Review Types of: 5-Month, Annual, and Special.	Modified Gap
ER98	274	Employee Relations	System should track and record inquiries from clients or employees for Reasonable Accommodation	Fit
ER99	275	Personnel Management	System must error when an employee is on Workers' Compensation and choses Election I to prohibit a warrant process if leave has been exhausted and system does not show entry of the LWOP form. System would error when an entry attempt is made for leave earnings for an employee who is on Workers' Compensation. Finally, system should easily identify employees on Workers' Compensation by illustrating a different background color on the screen.	Modified Gap
ET01	000	Training	Provide ability to establish mandatory training that all agency employees are required to attend (ethics, sexual harassment, cultural diversity, and job safety).	Modified Gap
ET01	201	Training	System must support the assignment and measurement of variable recurring training requirements.	Modified Gap
ET01	202	Training	System must identify employees who have not been assigned training requirements.	Fit
ET01	203	Training	System must allow assignment of subsets of employees to recurring training requirements.	Gap
ET01	204	Training	System must allow assignment of employees to batches of training requirements.	Fit
ET01	205	Training	Suspend assignment and measurement of requirements for employees on leave, stipend.	Fit
ET02	000	Training	Provide for the definition of a recommended education and career development curriculum based on position, skill category, and other criteria in accordance with the TDH Performance Journal's Learning Portfolio. This capability will allow supervisors to work with their employees to establish a career development plan specific to each particular employee.	Fit
ET03	001	Training	Provide the following functions associated with establishing and maintaining training courses:	Fit
ET03	002	Training	Ability to add, modify, delete and track course generations	Fit
ET03	003	Training	Ability to establish course templates with generic information	Fit
ET03	004	Training	Ability to establish maximum/minimum numbers of students to attend a course	Fit
ET03	005	Training	Ability to establish and edit for prerequisites for attending a course	Fit
ET03	006	Training	Ability to establish eligibility requirements for course attendance (job class, salary group, program area)	Gap
ET03	008	Training	Ability to maintain a waiting list at the course level	Fit
ET03	009	Training	Ability to track training costs at course level (budgeted vs. actual amount spent; roll-up of individual class cost data)	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ET03	010	Training	Ability to maintain a course catalog with full course description and dates offered	Fit
ET03	226	Training	Create Categories of courses.	Fit
ET03	227	Training	Allow ability to associate multiple types and credit hour values of Professional Continuing Education for courses. Add columns to course table so that a professional completing the course may receive the documentation he/she needs to apply training to licensing or certification standards for his/her professional discipline. Allow ability to associate multiple types and credit hour values for Professional Continuing Education to each course.	Gap
ET04	001	Training	Provide the following functions associated with establishing and maintaining training classes:	Fit
ET04	002	Training	Ability to establish, maintain, and view class information	Fit
ET04	003	Training	Ability to add class notes	Gap
ET04	004	Training	Ability to register prospective participants for specific training classes and pre-encumber funds upon successful registration	Gap
ET04	005	Training	Ability to capture anonymous class evaluation feedback through web-enabled evaluation surveys or other means and determine the timeframe after training to which evaluation will be requested (complete evaluation immediately after class versus one year after class)	Gap
ET04	006	Training	Ability to maintain a waiting list at the class level	Fit
ET04	007	Training	Ability to track training costs at class level (budgeted vs. actual amount spent; roll-up to course cost data)	Modified Gap
ET04	008	Training	Ability to close-out classes	Fit
ET04	009	Training	Ability to cancel classes	Fit
ET04	010	Training	Ability to maintain historical information on all classes	Fit
ET04	228	Training	System must create course and session records simultaneously.	Gap
ET04	229	Training	Ability to specify delivery method at the session level.	Gap
ET04	231	Training	Identify session as offered external or internal.	Fit
ET04	232	Training	Identify total duration of session.	Fit
ET04	233	Training	Enroll, or post with complete status, groups of employees to groups of sessions (Batching). Add pages and tables that allow user to enroll and post multiple participants as complete for multiple course sessions (example: new employee training) in an efficient manner. Users create templates of courses commonly taught in blocks, such as new employee orientation. As with vanilla PeopleSoft, users must create a session of each course. Unlike PeopleSoft vanilla, users enroll multiple participants in multiple course sessions on one page with one entry per participant, rather than having to open up a page for each session, and make two entries per participant (per session). Later, the end user selects "Post It" function to award attendance status of complete to each participant of each session, and close all sessions.	Gap
ET05	001	Training	Provide the following functions associated with establishing and maintaining training information at the employee level:	Fit
ET05	002	Training	Ability to add non-agency employees (for shared training with other agencies)	Fit
ET05	004	Training	Ability to automatically maintain student course history information	Fit
ET05	005	Training	Ability to track employee training needs/qualifications/certifications	Fit
ET05	006	Training	Ability to Provide a "tickler" when a certification date is approaching	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ET05	007	Training	Ability to Provide a "tickler" when a continuing professional education deadline is approaching	Gap
ET05	008	Training	Ability to add external training events (classes, workshops, seminars, and other relevant employee development events) or CBT/WBT events to an employee's training record. Data to be maintained should include (but is not limited to) course title, description, instructor's name, date and time, location, and cost.	Fit
ET05	010	Training	Ability to maintain an inventory of skills, prior work experience, significant accomplishments, languages, community activities, and professional memberships.	Fit
ET05	011	Training	Ability to maintain historical information by employee.	Fit
ET05	234	Training	ET05 234: Provide tickler when training due dates for sessions are approaching/past. ET01 000: Provide ability to establish mandatory training that all agency employees are required to attend (ethics, sexual harassment, cultural diversity, and job safety).	Gap
ET05	235	Training	Maintain course session history per employee.	Fit
ET05	236	Training	Add values so that all possible employee statuses related to course may be reported. Add incomplete, no show, dropped, credit.	Gap
ET06	000	Training	Provide ability to track employees waiting to enroll in a course or class (in waiting list order), and automatically move from waiting list status when a vacancy occurs or remove from a roster once class is closed.	Fit
ET07	000	Workflow Management	be integrated with industry-standard word processing and email applications to allow for the generation of automatic email responses or standard letters based on registration statuses (confirmation of training registration).	Fit
ET07	237	Workflow Management	System should produce participant notification in case of class cancelation.	Fit
ET08	001	Training	support automated scheduling of training classrooms, instructors, and special equipment required; and should track classroom usage, instructor usage and certifications, and special equipment usage.	Gap
ET08	238	Training	(See original requirement submitted by DHS) System should support automated scheduling of training classrooms, instructors, and special equipment required; and should track classroom usage, instructor usage and certifications, and special equipment usage.	Fit
ET09	000	Training	ET09 000: Provide ability to track funding spent on training by employee and by position at any level of the organization. ET28 253: The system shall provide the information necessary to create a request for vendor payment. ET31 256: The system shall provide class participant billing, assessing all associated charges per participant, whether a charge back to DHS participants according to their DIV/PAC code or a bill to other agencies.	Gap
ET10	001	Training	Track tuition assistance by employee.	Fit
ET11	000	Training	Provide ability to optionally establish maximum tuition assistance limits and edit against said limits.	Fit
ET12	000	Training	Track vehicular license status for employees (if position requires employee to have commercial driver's license) and defensive driving training requirements, and Provide a "tickler" for renewal dates for each.	Fit
ET13	001	Workflow Management	Training module should utilize system workflow functionality to Provide a step-by-step process to be completed in registering for training classes.	Fit
ET14	239	Training	The system shall provide the ability to update vendor, trainer, and course materials information associated with a course.	Fit
ET15	240	Training	The system shall allow the scheduling, rescheduling or cancellation of a class by date, reservation of a training site and/or specification of a trainer for a class.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ET16	241	Training	ET16 241: The system shall allow update of information for materials shipment to the training site. ET18 243: The system shall provide the ability to record the materials necessary for a course, maintain inventory levels, and indicate when levels are low for an upcoming class. In addition, the system should have the capability of generating a purchase order for the inventory/materials which need to be replaced. ET19 244: The system shall link the materials to the vendor provider. ET20 245: The system shall maintain all costs related to class materials and licenses to use vendor materials. ET21 246: The system shall provide the ability to record the receipt of materials. ET26 251: The system shall provide the ability to maintain information on training sites and all associated site cost, as well as material shipping sites.	Gap
ET17	242	Training	The system shall allow for the update of trainer's travel costs and the ability to record expenses.	Fit
ET18	243	Training	The system shall provide the ability to record the materials necessary for a course, maintain inventory levels, and indicate when levels are low for an upcoming class. In addition, the system should have the capability of generating a purchase order for the inventory/materials which need to be replaced.	Modified Gap
ET19	244	Training	The system shall link the materials to the vendor provider.	Modified Gap
ET20	245	Training	The system shall maintain all costs related to class materials and licenses to use vendor materials.	Modified Gap
ET21	246	Training	The system shall provide the ability to record the receipt of materials.	Modified Gap
ET22	247	Training	The system shall provide the ability to maintain trainer information, whether an employee or provided by a vendor. The system shall link the trainer to the associated course and class and allow update of trainer certification to teach course. The system shall increment the trainer certification to reflect the number of times taught this course.	Fit
ET23	248	Training	The system shall allow a participant to self-register in single or multiple classes.	Fit
ET24	249	Training	The system shall allow employees and non-state agency employees to self-register for classes via an industry-standard web-based browser and/or a voic response system.	Fit
ET26	251	Training	The system shall provide the ability to maintain information on training sites and all associated site cost, as well as material shipping sites.	Modified Gap
ET27	252	Training	The system shall provide any and all information for ad-hoc query and reporting with font control of headings and data. This is to include canned reports and pending class lists, as needed.	Fit
ET28	253	Training	The system shall provide the information necessary to create a request for vendor payment.	Modified Gap
ET30	255	Training	The system shall track the participants' certification of course curriculum.	Fit
ET31	256	Training	The system shall provide class participant billing, assessing all associated charges per participant, whether a charge back to DHS participants according to their DIV/PAC code or a bill to other agencies.	Modified Gap
ET96	257	Training	Add as a separate data item, the ability to identify special accommodations required for participation in a training program (e.g., does employee need Braille, large print, computer disk, special lighting, assistive listening devices, sign language interpreters, etc.) Capturing accommodation needs in a separate data item (rather than including them in general "employee notes" field) would allow these needs to be specifically listed in a report generated by the system.	Gap
ET97	258	Training	Add ability to provide a "tickler" when a legislatively imposed deadline is approaching (e.g., a requirement for refresher training on a topic such as EEO, etc.)	Modified Gap
ET98	259	Training	The ability to maintain an inventory of skills, prior work experience, significant accomplishments, languages, community activities and professional memberships could be added in the form of an "employee notes" field.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
ET99	260	Training	System must provide for successful conversion of existing data in the agency's Registrar database to the new data fields.	Gap
JC01	000	Job Classification Audit	Provide ability to maintain an electronic job description for all positions in the agency.	Fit
JC01	200	Job Classification Audit	System must provide ability to maintain an electronic job description for all positions in the agency and job descriptions are unique to each position.	Fit
JC02	001	Job Classification Audit	Provide ability to route automated job descriptions to Per Audit for job classification audit as follows:	Fit
JC02	002	Job Classification Audit	Job descriptions associated with all new positions	Fit
JC02	003	Job Classification Audit	Job descriptions under revision	Gap
JC02	004	Job Classification Audit	All job descriptions associated with a specific job class	Fit
JC02	005	Job Classification Audit	Random spot audits of all existing job descriptions	Fit
JC02	206	Job Classification Audit	Position number	Fit
JC02	207	Job Classification Audit	Class Title	Fit
JC02	208	Job Classification Audit	Functional title	Fit
JC02	209	Personnel Management	Sub-spec	Fit
JC03	000	Job Classification Audit	Provide for automatic routing of all new job descriptions to Per Audit, and should Provide edit to ensure that no actions take place against position associated with said job description until electronic approval has been Provided by authorized Per Audit staff.	Fit
JC04	001	Job Classification Audit	support audit of job descriptions for:	Fit
JC04	002	Job Classification Audit	Proper classification title	Fit
JC04	003	Job Classification Audit	Proper FLSA status	Fit
JC04	004	Job Classification Audit	Proper pay group	Fit
JC04	005	Job Classification Audit	Waiver of posting requirements	Fit
JC04	006	Job Classification Audit	Justification of steps above step 1	Gap
JC04	007	Job Classification Audit	Any other peculiarities associated with the job audit	Modified Gap
JC04	211	Job Classification Audit	Add EEO status.	Fit
JC05	001	Job Classification Audit	Provide ability to capture and maintain the following information associated with all job classification audits.	Gap
JC05	002	Job Classification Audit	Audit tracking number	Modified Gap
JC05	003	Job Classification Audit	Date received in Bureau of Human Resources	Modified Gap
JC05	004	Job Classification Audit	Auditor	Modified Gap
JC05	005	Job Classification Audit	Required documents	Modified Gap
JC05	006	Job Classification Audit	Receipt date of each required document	Modified Gap
JC05	007	Position Control	Current Budget:	Fit
JC05	008	Position Control	Organization	Fit
JC05	009	Position Control	Strategic program	Fit
JC05	010	Position Control	Fund	Fit
JC05	011	Position Control	Grant	Fit
JC05	012	Position Control	Project	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
JC05	013	Position Control	Recommended Budget:	Gap
JC05	014	Position Control	Organization	Gap
JC05	015	Position Control	Strategic program	Gap
JC05	016	Position Control	Fund	Gap
JC05	017	Position Control	Grant	Gap
JC05	018	Position Control	Project	Gap
JC05	019	Position Control	Recommended effective date	Gap
JC05	020	Job Classification Audit	Current:	Fit
JC05	021	Job Classification Audit	Classification title	Fit
JC05	022	Job Classification Audit	Classification name	Fit
JC05	023	Job Classification Audit	Group	Fit
JC05	024	Job Classification Audit	Step	Fit
JC05	025	Job Classification Audit	FLSA status	Fit
JC05	026	Job Classification Audit	Requested:	Modified Gap
JC05	027	Job Classification Audit	Classification title	Modified Gap
JC05	029	Job Classification Audit	Group	Modified Gap
JC05	030	Job Classification Audit	Step	Modified Gap
JC05	031	Job Classification Audit	FLSA status	Modified Gap
JC05	032	Job Classification Audit	Recommended:	Modified Gap
JC05	033	Job Classification Audit	Classification title	Modified Gap
JC05	035	Job Classification Audit	Group	Modified Gap
JC05	036	Job Classification Audit	Step	Modified Gap
JC05	037	Job Classification Audit	FLSA status	Modified Gap
JC05	038	Job Classification Audit	Recommended effective date	Modified Gap
JC05	039	Job Classification Audit	Date audit completed (date left Bureau of Human Resources)	Modified Gap
JC05	040	Job Classification Audit	Audit reason code / description (description inferred from entry of reason code)	Modified Gap
JC05	041	Job Classification Audit	Audit status code / description (description inferred from entry of status code)	Modified Gap
JC05	042	Job Classification Audit	Audit status effective date	Gap
JC05	229	Job Classification Audit	Sub-spec	Fit
JC05	233	Job Classification Audit	EEO category	Fit
JC05	256	Job Classification Audit	System should have the capability of handling multiple positions reviewed under a single audit that are part of the same job class.	Modified Gap
JC05	257	Job Classification Audit	System should be able to create (clone) audit based on existing audit.	Gap
JC05	258	Job Classification Audit	Add position number to list.	Modified Gap
JC05	259	Job Classification Audit	Add Schedule with group.	Modified Gap
JC05	261	Job Classification Audit	System should link to or cross reference the Payroll Classification Table.	Modified Gap
JC06	000	Job Classification Audit	Provide ability to effective date all audit actions.	Modified Gap
JC07	000	Job Classification Audit	Provide ability to maintain a complete history associated with all audit activity.	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
JC07	263	Job Classification Audit	System must provide ability to maintain a complete history associate with all audit history activity by position number.	Modified Gap
JC08	264	Job Classification Audit	System must provide a means to maintain the following data:	Gap
JC08	265	Job Classification Audit	Essential Job Functions (EJF) Table with ability to add, modify, and delete individual EJF as needed.	Modified Gap
JC08	266	Job Classification Audit	Allow up to ten (10) EJFs to be maintained for each audit/BJN.	Modified Gap
JC09	267	Job Classification Audit	System must provide a means to match EJFs for a given audit/BJN against other audits/BJNs to determine similarity. This match must also include inactive or deleted positions.	Gap
JC10	268	Job Classification Audit	System must provide a means to record the following data for each audit/BJN:	Gap
JC11	269	Job Classification Audit	Travel Demands of EJF	Gap
JC11	270	Job Classification Audit	Equipment Used and Percentage of Time Used for Each	Gap
JC11	271	Job Classification Audit	Audit Interview Date	Modified Gap
JC11	272	Job Classification Audit	Audit Interview Comments	Modified Gap
JC11	273	Job Classification Audit	Factor Ratings (1-9) for each of the following:	Gap
JC11	274	Job Classification Audit	Physical Demands of EJF in terms of frequency (Never, Occasional, Frequent, Continuous):	Modified Gap
JC11	275	Job Classification Audit	Sitting	Modified Gap
JC11	276	Job Classification Audit	Crawling	Modified Gap
JC11	277	Job Classification Audit	Standing	Modified Gap
JC11	278	Job Classification Audit	Twisting Upper Body	Modified Gap
JC11	279	Job Classification Audit	Walking	Modified Gap
JC11	280	Job Classification Audit	Climbing	Modified Gap
JC11	281	Job Classification Audit	Kneeling	Modified Gap
JC11	282	Job Classification Audit	Carrying (# lbs of ?)	Modified Gap
JC11	283	Job Classification Audit	Squatting	Modified Gap
JC11	284	Job Classification Audit	Lifting (# lbs of ?)	Modified Gap
JC11	285	Job Classification Audit	Bending	Modified Gap
JC11	286	Job Classification Audit	Other (specify)	Modified Gap
JC11	287	Job Classification Audit	Environmental/Hazard Demands of EJF (N, O, F, C):	Modified Gap
JC11	288	Job Classification Audit	Client/Customer Contact	Modified Gap
JC11	289	Job Classification Audit	Mechanical Hazards	Modified Gap
JC11	290	Job Classification Audit	Indoor Activity	Modified Gap
JC11	291	Job Classification Audit	Electrical Hazards	Modified Gap
JC11	292	Job Classification Audit	Outdoor Activity	Modified Gap
JC11	293	Job Classification Audit	Dust/Mites Hazard	Modified Gap
JC11	294	Job Classification Audit	Extreme Heat	Modified Gap
JC11	295	Job Classification Audit	Extreme Cold	Modified Gap
JC11	296	Job Classification Audit	Extreme Noise	Modified Gap
JC11	297	Job Classification Audit	Other (specify)	Modified Gap

Req No	*Seq No*	*Functional Area*	*Requirement Text*	*Fit or Gap*
JC11	298	Job Classification Audit	Ambulatory Demands of EJF	Modified Gap
JC11	299	Job Classification Audit	Cognitive Skills of EJF	Modified Gap
JC11	300	Job Classification Audit	Speech Communications of EJF	Modified Gap
JC11	301	Job Classification Audit	Written Communication Demands of EJF	Modified Gap
JC11	302	Job Classification Audit	Visual Acuity of EJF	Modified Gap
JC11	303	Job Classification Audit	Auditory Acuity of EJF	Modified Gap
JC11	304	Job Classification Audit	Independence	Modified Gap
JC11	305	Job Classification Audit	Planning	Modified Gap
JC11	306	Job Classification Audit	Results	Modified Gap
JC11	307	Job Classification Audit	Communications	Modified Gap
JC11	308	Job Classification Audit	Supervision	Modified Gap
JC11	309	Job Classification Audit	Knowledge	Modified Gap
JC11	310	Job Classification Audit	Mental Effort	Modified Gap
JC11	311	Job Classification Audit	Working Conditions	Modified Gap
JC12	312	Job Classification Audit	System must provide a means to maintain tables for the following:	Gap
JC12	313	Job Classification Audit	Separate tables (approximately six) for the Factor Ratings listed above.	Modified Gap
JC12	314	Job Classification Audit	A table containing the point ranges for each salary schedule/group.	Modified Gap
JC13	315	Job Classification Audit	System must provide a means to copy audit data from one audit to another.	Gap
JC14	316	Job Classification Audit	System must provide a means to identify other audits/BJNs which are identical to the given audit/BJN.	Gap
JC15	317	Job Classification Audit	System must provide a means to produce a variety of reports containing basic audit/BJN information as well as statistical data.	Gap
JC16	318	Job Classification Audit	System must be able to maintain historical data on all prior audits for that position, i.e., if a position has been audited each year for the past three years, each of those audits can be accessed as well as matched against.	Modified Gap
JC16	319	Job Classification Audit	System must provide a means to transfer audit data between the current Job Classification System (JCS) and the proposed PeopleSoft based system. Data transferred would include, but not be limited to:	Gap
JC16	320	Job Classification Audit	Functional Job Title	Modified Gap
JC16	321	Job Classification Audit	Job Descriptions	Modified Gap
JC16	322	Job Classification Audit	Essential Job Functions (EJF)	Modified Gap
JC16	323	Job Classification Audit	Class Number/Title	Modified Gap
JC16	324	Job Classification Audit	Salary Schedule/Group	Modified Gap
JC16	325	Job Classification Audit	FLSA	Modified Gap
JC16	326	Job Classification Audit	BJN/Position Number	Modified Gap
JC16	327	Job Classification Audit	Effective Date	Modified Gap
JC17	000	Job Classification Audit	Capture the Authorized Job Code resulting from a Job Classification Audit. This is captured separately from the requested and recommended Job Code fields.	Modified Gap
JC18	000	Job Classification Audit	The ability to search the system by a position's budget and item number.	Gap
PA01	200	Payroll Administration	System should be compatible with multiple pay periods (bimonthly, monthly) and multiple pay bases (hourly, salaried, per diem), however, should allow agencies to restrict to designated pay periods.	Fit

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PA02	001	Payroll Administration	PA02 001: Provide ability to calculate regular pay as follows: The employee's regular hourly rate is determined from the appropriate salary (group and step, group and range, salary) on the compensation table. The system should also allow employee's pay to fall between steps, except on Schedule A. PA02 003: Regular pay is calculated as follows: Exception employees who report exceptions in the pay period: Pay equates to regular hourly rate (calculated from employee's record, unless overridden through timesheet entry) x reported regular hours. PA07 000: Allow for partial period payment to employees who do not work the entire pay period (new hires, terminations, employees on leave without pay for a portion of the pay period).	Gap
PA02	002	Payroll Administration	Regular pay is calculated as follows: Exception employees who report no exceptions in the pay period: Pay equates to pay period amount from the employee's record.	Fit
PA02	003	Payroll Administration	Regular pay is calculated as follows: Exception employees who report exceptions in the pay period: Pay equates to regular hourly rate (calculated from employee's record, unless overridden through timesheet entry) x reported regular hours.	Modified Gap
PA02	004	Payroll Administration	Regular pay is calculated as follows: Positive time employees: Pay equates to regular hourly rate (calculated from employee's record, unless overridden through timesheet entry) x (reported regular hours + additional regular hours up to a total of 40 per week).	Fit
PA02	211	Payroll Administration	In addition to looking at compensation tables the system should look at the Effective Date Job History Record.	Fit
PA02	212	Payroll Administration	Define "exception employees." Does exception employees relate to mid-month actions?	Fit
PA02	214	Payroll Administration	PA02 214: To calculate compensation for monthly employees that only work part of the month (have dock pay): the amount of compensation is the product of the employees equivalent hourly rate of pay for that month and the number of hours worked in that month. For semi-monthly employees who do not work all the scheduled hours in the first half of the month (have dock pay) but do work all the scheduled hours in the second half: The compensation for the entire month is the product of the employees equivalent hourly rate of pay for that month and the number of hours worked by the employee during that month. The amount of compensation that must be paid to the employee for the first half of the month is equal to the product of the employees equivalent hourly rate of pay for that month and the number of hours worked by the employee in that half of the month. The amount of compensation that must be paid to the employee for the second half of the month is equal to the difference between the amount of compensation that must be paid to the employee for the entire month and the amount that must be paid for the first half of the month. PA02 215: For semi-monthly employees that work all available hours in the first half of a month but do not work all the available hours in the second half of the month (have dock pay), the amount of compensation that must be paid to the employee for the entire month is the product of the equivalent hourly rate of pay for that month and the number of hours worked by the employee during that month. The amount of compensation that must be paid to the employee for the second half of the month is equal to the difference between the amount of compensation that must be paid to the employee for the entire month and the amount of compensation that must be paid to the employee for the first half of the month. PA85 374: The system shall have the capability to: PA85 376: Reduce an employee's salary in any month by a dollar amount based on the number of leave without pay hours (or pay an employee for a reduced number of hours actually worked + paid leave time) PA85 377: Calculate an hourly rate (and base salary) based on the number of work/holiday hours in a given month (which varies from 160-184 hours).	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA02	215	Payroll Administration	For employees that work all available hours in the first half of a month but does not work all the available hours in the second half of the month the amount of compensation that must be paid to the employee for the entire month is the product of the equivalent hourly rate of pay for that month and the number of hours worked by the employee during that month. The amount of compensation that must be paid to the employee for the second half of the month is equal to the difference between the amount of compensation that must be paid to the employee for the entire month and the amount of compensation that must be paid to the employee for the first half of the month. This section also applies to semimonthly employees on leave without pay for less than half of an entire calendar month.	Modified Gap
PA03	001	Payroll Administration	Provide all required edits to ensure proper calculation of employee payroll, including:	Fit
PA03	002	Personnel Management	Provide all required edits to ensure proper calculation of employee payroll, including: Validating pay against compensation established in the compensation table	Modified Gap
PA03	003	Position Control	Validating class code associated with position	Fit
PA03	004	Position Control	Validating pay against budgeted compensation	Fit
PA03	218	Payroll Administration	PA03 218: On multiple combinations of account coding distributions: Department of Human Services (DHS) requires combination editing of organization and program cost account (PCA) (or program activity) codes. Ensure organization, PCA, and all other relevant codes are set up correctly to pass the combination edits in general ledger (GL). TL11 006: Validate account coding distributions (grant, project) entered on timesheets against data classification elements established in General Accounting module.	Gap
PA03	219	Position Control	Does this mean that the Positions will be "budgeted" in the Dept Budget panels?	Fit
PA04	001	Payroll Administration	Calculate total gross pay by employee by adding:	Fit
PA04	002	Payroll Administration	By adding: Regular pay (regular or hourly) "Hours-driven" pay Shift differential Benefit replacement pay Cost-of-living allowance Longevity Compensatory per diem Partial per diem Medical Services Trust Fund pay (for physicians) Incidentals (lump sum, payback, refund)	Fit
PA04	229	Payroll Administration	Cellular phone reimbursements	Fit
PA04	234	Payroll Administration	System should calculate longevity automatically based on total state service.	Modified Gap
PA04	236	Payroll Administration	System should allow for payment of compensatory time.	Fit
PA04	237	Payroll Administration	Add maximum security pay, interpreter pay, fire brigade pay, Foster Grandparent federal stipends.	Fit
PA05	240	Payroll Administration	System should have the capability to perform manual overrides.	Fit
PA06	001	Payroll Administration	Provide ability to process direct deposits for payroll using National Automated Clearinghouse Association (NACHA) format and required content, and generate remittance advices to support each transaction. allow for total net pay to be deposited to multiple bank accounts based on pre-established user-defined amounts or percentages.	Fit
PA06	002	Payroll Administration	SSN	Fit
PA06	003	Payroll Administration	Direct deposit amount	Fit
PA06	004	Payroll Administration	Routing number (bank ID)	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA06	005	Payroll Administration	Account type (savings, checking)	Fit
PA06	006	Payroll Administration	Account number	Fit
PA06	007	Payroll Administration	Prenote indicator	Modified Gap
PA06	241	Payroll Administration	Amend to state that the information provided by HHSAS will make it possible for direct deposits to be processed by the Comptroller. This appears that HHSAS will be processing the direct deposit. Also, it is assumed that this is not speaking to adds, changes and deletes as these occur online in Comptroller's System.	Fit
PA06	242	Payroll Administration	ISSUE 227 - CHANGE IN DECISION FOR DDP: Janet also noted that there is another UPDATE to our use of Direct Deposit data in PeopleSoft. TWC is updating the "TINS" database online. No TWC DDP data is being reported to SPRS presently, since the "interim" SPRS interface does not require it. MHMR will also use the Online Update feature with TINS, rather than add this data to the PeopleSoft Direct Deposit tables and then interfacing it to SPRS, who would then interface to TINS. Direct entry into TINS makes more sense, especially since this entry is being done by different individuals as required by the auditors.	Modified Gap
PA07	000	Payroll Administration	Allow for partial period payment to employees who do not work the entire pay period (new hires, terminations, employees on leave without pay for a portion of the pay period).	Modified Gap
PA08	000	Payroll Administration	PA08 000: Provide ability to process (1) lump sum termination pay for eligible annual leave (when an employee has six months of continuous state service) and (2) FLSA (Fair Labor Standards Act) overtime balances. Payments for lump sum termination pay should not be processed until 30 days after termination date, but must be able to override 30 day waiting period for a deceased employee. TL31 000 (#2): Provide ability to allow terminating employees to (1) receive a lump sum payment for their remaining leave 30 days after termination.	Gap
PA08	243	Payroll Administration	System should allow for overtime payments may be made at any time. There is no requirement to wait until an employee has been off the payroll for 30 days before paying earned overtime	Fit
PA08	244	Personnel Management	System must identify six months continuous service.	Modified Gap
PA08	260	Payroll Administration	Add: System should calculate partial period payments to employees based on the effective date of the action entered (rather than entry of the number of days or hours which would require manual off-line calculations).	Fit
PA09	000	Payroll Administration	Provide ability to distinguish employees subject to FICA from employees not subject to FICA.	Fit
PA10	001	Payroll Administration	Be flexible and expandable regarding earnings accumulators and their associated calculations. Provide the ability to establish earnings accumulator limits; these limits should be flexible as they are subject to change. The flexibility/expandability should be user-maintainable. Current earnings accumulators are:	Fit
PA10	002	Payroll Administration	Federal income tax withholding base wages	Fit
PA10	003	Payroll Administration	FICA (Social Security/OASDI) base wages	Fit
PA10	004	Payroll Administration	FICA (Medicare) base wages	Fit
PA10	005	Payroll Administration	Retirement salary base	Fit
PA10	006	Payroll Administration	Unemployment salary base	Fit
PA10	007	Payroll Administration	Worker's compensation salary base	Fit
PA10	008	Payroll Administration	Insurance salary base	Fit
PA10	009	Payroll Administration	TexaSaver 401(k) base	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA10	010	Payroll Administration	457 deferred compensation base	Fit
PA10	011	Payroll Administration	Earned income credit base	Fit
PA10	012	Payroll Administration	State income tax base wages (for multiple states)	Fit
PA10	261	Payroll Administration	Should also add Year-To-Date gross wages accumulator, BRP accumulator, longevity accumulator and an imputed income accumulator.	Fit
PA100	200	Payroll Administration	The system shall compile employee information so as to create a W-2 at the end of the calendar year for each employee paid during the calendar year.	Fit
PA101	201	Payroll Administration	The system shall provide an interface to the Social Security Administration (SSA) for purposes of submitting W-2 information electronically per current SSA rules.	Fit
PA102	001	Payroll Administration	Be compatible with multiple pay periods (semimonthly, monthly) and multiple pay bases (hourly, salaried, per diem).	Fit
PA103	203	Personnel Management	The system shall have the capability to:	Fit
PA103	204	Personnel Management	* Display a minimum of 24 job history entries and up to 72 for every employee; historical and current (change action code – reason; classification; salary schedule, group, and step; employee type; employment percentage; merit status; and LWOP information) Retain unlimited job history for each employee	Fit
PA103	205	Payroll Administration	* Display payroll history (current + 2 fiscal years). Salaries, entitlement pay, gross pay, net pays, detail deductions, pay period dates. Also provide YTD totals.	Fit
PA104	206	Personnel Management	The system shall provide for the entry of imported wage information from the previous agency where employed and factor these balances in to the payroll calculations (wages, BRP, deferred compensation, leave balances, etc).	Fit
PA105	207	Payroll Administration	The system shall have the capability to provide "What if" payroll information on an individual employee basis. RE. PA105/208: Allow for the entry of gross pay, entitlements, and deductions for the purpose of providing gross to net calculations without posting the data to the production system. RE. PA105/209: Allow the user to continue making changes to the above categories to produce different results. RE. PA105/210: Allow for the documenting of the results.	Gap
PA105	208	Payroll Administration	§ Allow the entry gross pay, entitlements, and deductions for the purpose of providing gross to net calculations without posting the data to the production system.	Modified Gap
PA105	209	Payroll Administration	§ Allow the user to continue making changes to the above categories to produce different results.	Modified Gap
PA105	210	Payroll Administration	§ Allow for the documenting of the results.	Modified Gap
PA105	211	Payroll Administration	§ Include a self-service "wizard" to assist employees in accomplishing this What if entry. The wizard will be accessed through an industry-standard web browser.	Gap
PA107	213	Payroll Administration	The system shall have the capability to generate an electronic data change confirmation notice to the employee for all employee payroll/benefit changes. If an electronic means does not exist, provide paper confirmation.	Fit
PA108	214	Payroll Administration	The system shall have the capability to support IRS policy regarding W-4 notifications.	Fit
PA108	215	Payroll Administration	§ processing of a W-4 with more than 10 deductions	Fit
PA108	216	Payroll Administration	§ processing of a W-4 requesting exempt status from Federal withholding	Fit
PA108	217	Payroll Administration	§ ability to change with IRS policy changes.	Fit
PA109	218	Payroll Administration	RE PA109/218: The system shall have the capability to calculate and retain a warrant issue date and warrant number for each payroll. RE PA109/219: Provide audit trail of warrant numbers and cancellations.	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA109	219	Payroll Administration	Provide audit trail of warrant numbers and cancellations.	Modified Gap
PA11	000	Payroll Administration	Track taxable fringe benefits/allowances, such as moving expenses and educational assistance. Provide ability to track taxable educational assistance.	Fit
PA110	220	Personnel Management	The system shall utilize a pay schedule (i.e.. A,B, and exempt) and a pay group to include salaries (Min and Max for schedule B and exempt, using steps for A) used for paying employees. Payroll shall verify that salary is valid for schedule, group and step.	Fit
PA111	221	Payroll Administration	The system shall compute wages based on items affecting payroll including changes in appropriation, cost center, fund, PCA, salary, organizational unit (region/division), percent employed, shift differential (there may be others!). Payroll should break down costs as necessary to identify funds appropriately.	Fit
PA112	222	Payroll Administration	The system shall recognize percent employed and pay based on hours worked. See changes effective mid-month.	Gap
PA113	223	Payroll Administration	The system shall allow use of unique 7-digit (document) number be assigned to each payroll with a unique number for cancels and writes. This number includes a month/year run and feeds both FMIS and Comptroller's system. Currently assigned manually by Fiscal/Payroll. Ideally, voucher numbers should be loaded into a table and assigned automatically. One consideration is that all other payment systems utilize a voucher number.	Modified Gap
PA113	224	Payroll Administration	Automated process probably should reside in Financials modules.	Modified Gap
PA116	227	Payroll Administration	PeopleSoft shall provide Comptroller object codes to denote type of payment and for the Comptroller paytape interface. I.e.. Gross pay, longevity, cancellations, overtime payrolls, etc. each carry a unique Comptroller's object code. This is currently not carried in HRMIS, but rather computed on the 'backend' for reporting to the Comptroller.	Fit
PA117	228	Payroll Administration	The system shall provide a method of prioritizing deductions and, if sufficient funds are not available, either not processing the deduction or processing a partial deduction…. It will be necessary to calculate some deductions prior to 'backing out;' should funds not be available.	Fit
PA118	229	Payroll Administration	The system shall provide the following methods for terminating deductions: a) an end date, b) a finite number of deductions, and c) a total amount to be deducted.	Fit
PA119	230	Payroll Administration	The system shall carry a table of valid vendors, addresses their offerings, and their EIN numbers for the purposes of payment as well as validation.	Fit
PA12	000	Payroll Administration	System should track non-taxable, but W-2 reportable items such as 457 and 401(k) Deferred Compensation and Dependent Care benefits, including health care and other fringe benefits.	Modified Gap
PA120	232	Payroll Administration	The system will allow refunds/payment of deductions deducted in error, with consideration of tax implications for employee and agency, including state share adjustments.	Fit
PA122	234	Payroll Administration	The system shall deduct FIT (federal income tax) based on federal withholding tables and employees withholding status and exemptions.	Fit
PA123	235	Payroll Administration	The system shall deduct extra withholding specified by the employee.	Fit
PA124	236	Payroll Administration	The system shall not withhold FIT from employees' pay if the employee is 'exempt'.	Fit
PA126	238	Payroll Administration	The system shall deduct from eligible employees the amount of FICA required by law. Currently 6.2% of FICA covered wages up to a wage ceiling.	Fit
PA126	239	Payroll Administration	The system should also compute the amount of employer matching.	Fit
PA127	240	Payroll Administration	The system shall deduct from eligible employees' pay the amount of Medicare tax required by law as well as the state matching portion.	Fit
PA128	241	Payroll Administration	The system shall be capable of setting up a retirement deduction, the default for which is automatic, to deduct a percentage (currently 6%) of after-tax wages for remittance to the Employees Retirement System. Compute and report state share.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA128	242	Payroll Administration	The system shall also be capable of not requiring this deduction (in the case of retired employees returning to work).	Fit
PA129	243	Payroll Administration	The system shall compute and report the amount of state share retirement.	Fit
PA13	000	Payroll Administration	Provide ability to calculate shift differential pay automatically based on permanently assigned eligibility and shift data maintained in the System.	Fit
PA14	000	Payroll Administration	Provide ability to calculate "hours-driven" pay (FLSA overtime) and edit for employee earnings type eligibility (only certain employees are eligible for FLSA overtime).	Fit
PA14	246	Payroll Administration	Add one for one compensatory time. Only certain employees are eligible.	Fit
PA15	000	Payroll Administration	Provide ability to process trial payrolls for monthly, semi-monthly, and other supplemental payrolls.	Fit
PA15	248	Payroll Administration	The system shall provide for the capability to run a test payroll providing HR and Fiscal Payroll departments with reports that identify exceptions, errors, and balance conditions. This process would provide reports without updating the database.	Fit
PA15	249	Position Control	System should have the ability to pay employees who change from FLSA covered positions to FLSA non-covered positions.	Fit
PA16	000	Payroll Administration	Allow for the execution of a separate and unlimited supplemental payroll (in addition to the regularly scheduled payroll) on an "as needed" basis.	Fit
PA16	252	Payroll Administration	Need ability to process multiple "Off-Cycle" Payrolls for same pay period for specific employees without creating paysheets for all employees.	Fit
PA17	001	Payroll Administration	Provide a deduction table to establish and maintain information and rules specific to an unlimited number of deductions:	Fit
PA17	002	Payroll Administration	Deduction type	Fit
PA17	003	Payroll Administration	Deduction name	Fit
PA17	004	Payroll Administration	Deduction priority/order	Fit
PA17	005	Payroll Administration	Deduction arrears allowed	Fit
PA17	006	Payroll Administration	Deduction calculation base	Fit
PA17	007	Payroll Administration	Scheduled frequency	Fit
PA17	008	Payroll Administration	Partial deduction allowed (Y/N)	Fit
PA17	009	Payroll Administration	GL liability account	Fit
PA17	010	Payroll Administration	GL fiscal accrual code	Fit
PA17	011	Payroll Administration	Effective date	Fit
PA18	001	Payroll Administration	Provide flexible and expandable deduction accumulators. Provide the ability to establish accumulator limits; these limits should be flexible as they are subject to change. The flexibility/expandability should be user-maintainable. The accumulators should include the following:	Fit
PA18	002	Payroll Administration	For employee deduction	Fit
PA18	003	Payroll Administration	Pay period	Fit
PA18	004	Payroll Administration	Month to date	Fit
PA18	005	Payroll Administration	Year to date	Fit
PA18	006	Payroll Administration	For State contribution	Fit
PA18	007	Payroll Administration	Pay period	Fit
PA18	008	Payroll Administration	Month to date	Fit
PA18	009	Payroll Administration	Year to date	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA19	000	Payroll Administration	Provide ability to designate each deduction for pre-tax or after-tax processing.	Fit
PA20	000	Payroll Administration	Maintain employee withholding data for Federal and State taxes, and properly calculate employee taxes in accordance with Federal and State law by utilizing employee tax withholding data, tax tables, and earnings accumulators associated with each tax.	Fit
PA201	000	Payroll Administration	The system shall provide for the capability to archive and print prior period W-2s for duplicates.	Fit
PA202	000	Payroll Administration	The system shall provide for the payment of hourly stipends not on the classified salary schedule for the Federal Foster Grandparent Program. These stipends are not taxable for FICA or FIT.	Fit
PA205	000	Payroll Administration	The system shall provide for the ability to make prior monthly adjustments and correct balances accordingly.	Fit
PA206	000	Payroll Administration	The system shall provide for restricted access to the payroll run after the final test payroll.	Fit
PA207	000	Payroll Administration	The system shall provide for the capability to post personal payments from employees and adjust balances as a result.	Fit
PA208	000	Payroll Administration	The system shall preclude supplemental payments for a pay period where the original payment has not been reversed.	Gap
PA21	000	Payroll Administration	Provide ability to allow employees to withhold additional Federal income tax beyond tax amounts computed based on tax tables and withholding allowances.	Fit
PA210	000	Payroll Administration	The system shall provide for multiple payroll pay frequencies on the same payroll run on the same night.	Fit
PA213	000	Payroll Administration	The system shall provide for refunds of 401(k), 457, and 403(b) with the appropriate deduction and handling for the W-2 (withholding gross handled appropriately on the W-2).	Fit
PA214	000	Payroll Administration	The system shall provide for deduction arrears processing when a deduction was not taken due to insufficient earnings.	Fit
PA215	150	Personnel Management	System shall provide for correction of social security numbers with the correct resulting transfer of any prior payments from the incorrect number and notify external systems of the change in SSN.	Gap
PA22	000	Payroll Administration	Calculate employer portion of taxes and benefits calculated as a percentage of earnings based on employee earnings accumulators.	Fit
PA23	000	Payroll Administration	Provide ability to monitor annual maximum deduction amounts and halt the deduction once the predefined maximum is reached.	Fit
PA234	000	Base Benefits	Provide ability to derive annual base benefit rate (insurance base salary) at start of the fiscal year and for new hires based on ERS rules.	Gap
PA236	000	Payroll Administration	We need to send the Vendor ID for all General Deductions and Taxes to the Comptroller every payroll. Garn Spec Data has this detail, however, regular General Deductions do not.	Fit
PA238	000	Payroll Administration	Need a Fiscal Year End Process to automatically update the Deduction End Date to the Fiscal Year End Date for specific Deduction Codes.	Gap
PA239	000	Payroll Administration	Be able to track multiple service purchase codes (2 characters for type of service), and contract number (10 digits) at the employee deduction level. There are several "Service Purchase Codes" (2 Char) that denotes the type of service that you are buying back which is assigned to the employee record. In addition, there is a Contract Number (10 digit number with one digit fixed) that is assigned to the employee record. Both of these codes will need to be Customized fields in a custom table which should be attached to the General Deduction Data panel group for the employee.	Gap
PA24	000	Payroll Administration	Provide ability to process deductions taken in a fixed amount each pay period (insurance premium).	Fit
PA240	000	Base Benefits	Will need 457 plan history data similar to the PS 403 Annuity Data.	Modified Gap

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PA241	000	Base Benefits	Need an "ERSFEE" employer paid General Deduction with a Flat Amount of $3.00 and a Goal Amount of $3.00 for all applicable employees having active Retirement records. This would reduce manual Monthly Payrolls and manual accounting entries for ERS Fees.	Gap
PA243	000	Payroll Administration	Need a custom view of data from values already in another table in the Accounting database to retain the substring of the account code for fund source, company, Appropriation Year and Fiscal Year, along with the appropriation number. It will tie to the PCA code for interface to Comptroller and SPRS.	Modified Gap
PA244	000	Payroll Administration	Be able to limit access to decentralized paysheet entry for partial pay.	Gap
PA245	000	Base Benefits	System must prevent savings plans from being taken as an after-tax investment.	Gap
PA246	000	Payroll Administration	System must prevent out of balance situations when adjusting balances.	Gap
PA247	427	Time, Labor, & Leave A	"Bolt-On' potential customization if Time and Labor does not meet our needs in PS 8.0. MHMR recognized the need to address data entry issues for for Hourly Time Entry and Exception Time Entry for Overtime, Comp Time, and Partial Pay Periods, along with One Time Merit Pays, Lump Sum Leave Pay, etc. This is a major issue for MHMR with its large employee population and decentralized payroll offices. MHMR's approach minimizes the impact to the Payroll system and substantially reduces the risk of violating state legislative mandates and Comptroller rules concerning Article IX salaries and personnel actions. MHMR's main concerns were accuracy of employees' pay, adherence to Legislative and Comptroller requirements for pay calculation and reporting, and to facilitate data entry ease and efficiency given the large volume of transactions involved without customization to the PS delivered Paysheets or COBOL Payroll processes. MHMR's approach consists of creating several "bolt-on" custom tables and panels to allow for the discreet data entry for each function (i.e. Hourly time worked, Overtime to be paid, etc.). Edits to support various State and Federal mandates, such as FLSA overtime rules, will be included. Having these tables and panels eliminates the need to customize the delivered Paysheet panels, which will then be limited to view only for the facilities. A process will be run to take the data from the P.A.R. tables and automatically update the Paysheets. This approach fits in well with the planned approaches to Benefit Replacement Pay and Longevity Pay processing. Again, this allows MHMR to keep from customizing the vanilla PS Paysheet tables, panels and processes, which is not recommended for tables that are referenced in the PS Payroll processes. Furthermore, this approach allows MHMR to correctly calculate pay for partial periods worked according to Comptroller policies, which vanilla PeopleSoft does not.	Gap
PA25	000	Payroll Administration	Provide ability to process deductions that are a specified dollar amount or computed as a percentage of pay.	Fit
PA26	000	Payroll Administration	Provide ability to assign effective start/stop dates for all deductions.	Fit
PA27	000	Payroll Administration	Provide ability to process refunds of overpayments with a target amount (reimbursement to the State of an overpayment made to an employee through an installment plan).	Fit
PA28	000	Payroll Administration	The State allows employees to direct a portion of their net pay to various charities (United Way). Additionally, State employees are provided with the option to have TPEA or TSEU association dues automatically deducted from their pay. Maintain voluntary deduction data associated with employee charitable contributions and payment of various association dues and print this data on earnings statements.	Fit
PA28	001	Payroll Administration	The State allows employees to direct a portion of their net pay to various charities. Additionally, State employees are provided with the option to have TPEA or TSEU association dues automatically deducted from their pay. Maintain voluntary deduction data associated with employee charitable contributions and payment of various association dues and print this data on pay stubs.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA28	002	Payroll Administration	The State allows employees to direct a portion of their net pay to various charities.- FIT Additionally, State employees are provided with the option to have TPEA or TSEU association dues automatically deducted from their pay.- FIT Maintain voluntary deduction data associated with employee charitable contributions and payment of various association dues and print this data on earnings statements.	Fit
PA29	001	Payroll Administration	State employees are Provided with the option to purchase various options for medical insurance coverage (Blue Cross/Blue Shield, HMO, PPO). The insurance premium is paid by combination of employee and State contributions. capture the following benefits deductions and insurance coverage data and Provide for the ability to print this data on pay stubs:	Fit
PA29	002	Payroll Administration	Deduction type	Fit
PA29	003	Payroll Administration	Pay period deduction amount	Fit
PA29	004	Payroll Administration	Month-to-date employee deduction amount	Fit
PA29	005	Payroll Administration	Year-to-date employee deduction amount	Fit
PA29	006	Payroll Administration	Pay period State contribution amount	Fit
PA29	007	Payroll Administration	Month-to-date State contribution amount	Fit
PA29	008	Payroll Administration	Year-to-date State contribution amount	Fit
PA29	010	Payroll Administration	Plan ID	Fit
PA29	011	Payroll Administration	Flexible benefits indicator	Fit
PA29	012	Payroll Administration	Flexible benefits fee (for possible future use)	Fit
PA29	013	Payroll Administration	Coverage code (Single, Family)	Fit
PA29	014	Payroll Administration	Effective start date	Fit
PA29	015	Payroll Administration	Effective end date	Fit
PA29	263	Base Benefits	Should state, "paid by combination of employee and State contributions and SKIP."	Modified Gap
PA29	264	Payroll Administration	"…insurance coverage data and provide for the ability to provide this data on earning statements." Information could be provide on an electronic form.	Fit
PA29	265	Payroll Administration	System should capture pay period , and year-to-date state contribution amount accumulators for SKIP and provide the ability to present this data on earnings statements.	Modified Gap
PA31	001	Payroll Administration	State employees are Provided with the option to purchase various other types o insurance coverage to include, but not limited to life, dental, long-term disability, accidental death and dismemberment, dependent care. Capture benefits deductions and insurance coverage data as follows:	Fit
PA31	002	Payroll Administration	Deduction type (multiple types of coverage)	Fit
PA31	003	Payroll Administration	Pay period employee deduction amount	Fit
PA31	004	Payroll Administration	Month-to-date employee deduction amount	Fit
PA31	005	Payroll Administration	Year-to-date employee deduction amount	Fit
PA31	006	Payroll Administration	Pay period State contribution amount	Fit
PA31	007	Payroll Administration	Month-to-date State contribution amount	Fit
PA31	008	Payroll Administration	Year-to-date State contribution amount	Fit
PA31	010	Payroll Administration	Plan ID	Fit
PA31	011	Payroll Administration	Flexible benefits indicator	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA31	012	Payroll Administration	Flexible benefits fee (for possible future use)	Fit
PA31	013	Payroll Administration	Coverage code (Basic Life Plan-$5,000, Term Life - one to four times employee's base salary. The system should indicate on an employees pay stub when insurance costs increase because of age or salary increases and state why based on Employee Retirement System tables)	Fit
PA31	014	Payroll Administration	Effective start date	Fit
PA31	015	Payroll Administration	Effective end date	Fit
PA32	000	Payroll Administration	Calculate imputed income subject to withholding tax and FICA taxes for term life insurance exceeding $50,000 or any other amount designated by law.	Gap
PA33	002	Payroll Administration	System should allow for separate deduction accumulation of the following, but not limited to the following, insurance coverages on a monthly and year to date basis:	Fit
PA33	003	Payroll Administration	Medical	Fit
PA33	004	Payroll Administration	Dental	Fit
PA33	005	Payroll Administration	Term life	Fit
PA33	006	Payroll Administration	Optional whole life (Texas Protects)	Fit
PA33	007	Payroll Administration	Dependent life	Fit
PA33	008	Payroll Administration	Accidental death and dismemberment	Fit
PA33	009	Payroll Administration	Long-term disability	Fit
PA33	010	Payroll Administration	Short-term disability	Fit
PA34	001	Payroll Administration	State employees participate in the Employees Retirement System. Currently, employees contribute 6% of their gross monthly base salary. The State matches the employee contribution at a rate of 6 %. The maintain retirement plan deduction data based on flexible, user-defined criteria as follows:	Fit
PA34	002	Payroll Administration	Deduction type	Fit
PA34	003	Payroll Administration	Pay period employee deduction amount	Fit
PA34	004	Payroll Administration	Year-to-date employee deduction amount	Fit
PA34	005	Payroll Administration	Pay period State contribution amount	Fit
PA34	006	Payroll Administration	Year-to-date State contribution amount	Fit
PA34	285	Payroll Administration	System must provide for retirement calculation for non ERS eligible employees.	Fit
PA34	286	Base Benefits	Skip insurance premiums (ERS match).	Modified Gap
PA35	001	Payroll Administration	Provide for the purchase by State employees of all actively issued U.S. Savings Bonds, including the "I" series, through payroll deduction. For each bond deduction, compare the amount deducted since the last bond was purchased with the goal amount (purchase price) of the bond.	Fit
PA35	002	Payroll Administration	When the current total amount deducted for a bond equals or exceeds the bond purchase price, generate a transaction that indicates a bond is to be purchased and retain the residual balance for use in subsequent periods.	Fit
PA36	000	Payroll Administration	Allow for an unlimited number of bond deductions per employee.	Fit
PA37	001	Payroll Administration	Maintain savings bond information as follows:	Fit
PA37	002	Payroll Administration	Bond denomination/purchase price	Fit
PA37	003	Payroll Administration	Bond owner name	Fit
PA37	004	Payroll Administration	Bond owner SSN	Fit
PA37	005	Payroll Administration	Bond owner address	Fit

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PA37	006	Payroll Administration	Deduction amount	Fit
PA37	007	Payroll Administration	Deduction frequency	Fit
PA37	008	Payroll Administration	Year-to-date balance	Fit
PA37	009	Payroll Administration	Carry forward balance	Fit
PA37	010	Payroll Administration	Co-owner/beneficiary name (multiple beneficiaries)	Fit
PA37	011	Payroll Administration	Co-owner/beneficiary address (multiple beneficiaries)	Fit
PA37	012	Payroll Administration	Co-owner/beneficiary SSN (multiple beneficiaries)	Fit
PA37	013	Payroll Administration	Co-owner/beneficiary code (multiple beneficiaries)	Fit
PA37	014	Payroll Administration	Effective start date	Fit
PA37	015	Payroll Administration	Effective end date	Fit
PA37	289	Payroll Administration	System should maintain unlimited history of savings bond information.	Fit
PA38	001	Payroll Administration	Provide for the electronic transmission of savings bond purchase information to the Federal Reserve Bank in Kansas City for bond issuance. Additionally, the process should track accumulated bond carry forward amounts by employee.	Fit
PA38	002	Payroll Administration	Savings bond file	Fit
PA38	003	Payroll Administration	Bond issuance data at employee level	Fit
PA38	004	Payroll Administration	Provide for the electronic transmission of savings bond purchase information to the Federal Reserve Bank in Kansas City for bond issuance. Additionally, the process should track: Control totals.	Gap
PA38	005	Payroll Administration	Number of bonds issued by denomination	Fit
PA38	006	Payroll Administration	Total dollar amount transmitted to bank (total by denomination and for entire transmission)	Fit
PA39	002	Payroll Administration	Provide ability to establish and maintain garnishments or levies against disposable/gross income for Federal and State tax levies, court-ordered garnishments, outstanding liabilities to the State, or other reasons dictated by State or Federal law. Capture the following information:	Fit
PA39	003	Payroll Administration	Deduction type	Fit
PA39	004	Payroll Administration	Withholding amount or percent	Fit
PA39	005	Payroll Administration	Withholding total amount	Fit
PA39	006	Payroll Administration	Pay period withholding amount	Fit
PA39	007	Payroll Administration	Year-to-date withholding amount	Fit
PA39	008	Payroll Administration	Disposable income attributes	Gap
PA39	009	Payroll Administration	Spouse social security number	Gap
PA39	010	Payroll Administration	Court order/case number	Fit
PA39	011	Payroll Administration	Disbursement name	Fit
PA39	012	Payroll Administration	Disbursement address	Fit
PA39	013	Payroll Administration	Disbursement county	Fit
PA39	014	Payroll Administration	Order of withholding issue date	Fit
PA39	015	Payroll Administration	Authority for withholding	Fit
PA39	016	Payroll Administration	Effective start date	Fit
PA39	017	Payroll Administration	Effective end date	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA39	018	Payroll Administration	GL Account or Comptroller Object Code	Gap
PA39	019	Payroll Administration	Print the following individual garnishment information on a remittance advice: RE PA39/020: Garnishment type (on remittance advice) Deduction type (on earnings statement) RE PA39/024: Year-to-date withholding amount (on remittance advice and earnings statement) RE PA39/028: Disbursement name RE PA39/029: Disbursement Address RE PA39/030: Disbursement County RE PA83/372: The system shall allow certain deductions which are cancelled to be refunded by reducing the next payment to the vendor.	Gap
PA39	020	Payroll Administration	Garnishment type (on remittance advice) Deduction type (on earnings statement)	Modified Gap
PA39	021	Payroll Administration	Withholding amount or percent	Fit
PA39	023	Payroll Administration	Pay period withholding amount (on remittance advice and earnings statement)	Fit
PA39	024	Payroll Administration	Year-to-date withholding amount (on remittance advice and earnings statement)	Modified Gap
PA39	028	Payroll Administration	Disbursement name	Modified Gap
PA39	291	Payroll Administration	Need to all consider requirements for Spousal Maintenance (HB 691),	Fit
PA40	000	Payroll Administration	Automatically adjust garnishment and child support deduction amounts if the disposable income requirements will not be met after the deduction is taken. Provide edit to ensure that no more than 50% of disposable income may be withheld for child support or 10% of disposable income for student loans in all cases. have the ability to print this data on employee's pay stubs.	Fit
PA40	001	Payroll Administration	Provide edit to ensure that no more than 50% of disposable income may be withheld for child support or 10% of disposable income for student loans in all cases.	Gap
PA41	001	Base Benefits	State employees may optionally contribute to 457, 403(b), or 401(k) Deferred Compensation Plan(s). The 457 plan is a two-tiered program. If an employee is not in a "catch-up" status, a maximum deduction limit per calendar year is applied. If the employee is in a "catch-up status", a higher maximum deduction amount per calendar year is applied. Deductions associated with the deferred compensation plan are processed as pre-tax deductions. Maintain deferred compensation plan deduction data. Employees may participate in both plans at the same time.	Modified Gap
PA41	002	Payroll Administration	Provide for the ability to print data on employee's earnings statement as follows:	Fit
PA41	003	Payroll Administration	Deduction type	Fit
PA41	004	Payroll Administration	Deduction amount	Fit
PA41	005	Payroll Administration	Year-to-date amount	Fit
PA41	006	Payroll Administration	Plan type (457 or 401k)	Modified Gap
PA41	010	Payroll Administration	401(k) loan information	Fit
PA41	012	Payroll Administration	Effective start date	Fit
PA41	013	Payroll Administration	Effective end date	Fit
PA41	097	Payroll Administration	Mark copy of check as non-negotiable, or don't print check on remittance advice.	Modified Gap
PA41	098	Payroll Administration	Message "Do not cash before XX date"	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA41	099	Payroll Administration	1)Displaying employee leave balances on Earnings Statement 2) Mark copy of check as non-negotiable, or don't print check on remittance advice. 3) Print garnishments on employee's earnings statement 4) Don't display hourly rate in the "Hours and Earnings, Current" section of the earnings statement (part of PA02 001).	Gap
PA41	292	Payroll Administration	Add, "System should monitor and provide notice of maximums exceeded."	Fit
PA42	000	Base Benefits	Provide an edit to ensure that no 401(k) or 457 deferrals are taken for 12 months from the date hardship status is taken.	Modified Gap
PA44	000	Payroll Administration	Provide ability to allow partial deductions if an employee's pay is insufficient to cover the deduction. Provide ability to identify whether partial deductions are allowed for each deduction type. If a partial deduction is accepted, the corresponding deduction accumulator should be incremented only by the amount of the partial deduction taken. also allow for adjustments to normal deduction amounts, either increasing or decreasing, for a specified number of pay periods.	Fit
PA45	001	Payroll Administration	Allow for prioritizing the order in which deductions are taken in the event that an employee's pay is insufficient to cover all deductions. Also, provide for an automatic deduction of the amount in arrears (in addition to the regularly-scheduled deduction) during the subsequent pay period. The corresponding deduction accumulator should be incremented by both the arrears amount and the regularly-scheduled deduction amount. Current priority of deductions is as follows:	Fit
PA45	002	Payroll Administration	1) Federal income tax 2) FICA (Social Security and Medicare) 3) State income tax 4) Retirement 5) Bankruptcy court order 6) Child support court order (for multiple children) 7) IRS levy 8) Student loan levy 9) Insurance deduction 10) TexFlex – health care reimbursement accounts 11) TexFlex – dependent care reimbursement accounts 12) Additional federal income tax 13) Housing deduction 14) Membership dues (TPEA or TSEU) 15) TexaSaver 401(k) loan repayment 16) TexaSaver 401(k) contribution 17) Deferred compensation 457 contribution 18) State service buyback 19) Charitable contributions (up to 9 contributions through 3 umbrella groups) 20) Texas Tomorrow Fund (pre-paid college education) 21) Savings Bonds (multiple) 22) Texas Protects optional whole life insurance 23) Credit union accounts (up to 3) 24) Savings accounts 25) Checking accounts 26) Spousal Maintenance 27) Administrative fees for child support 28) Administrative fees for wage garnishment 29) Administrative wage garnishments to pay federal non tax debts 30) Recoup excess compensation	Fit
PA47	000	Payroll Administration	Provide ability to generate special payments as needed (e.g., supplemental system-generated payroll expedites), in addition to the regular bimonthly and monthly payments. process taxes and deductions in accordance with employee information maintained in the System and should allow for overrides for the special warrant.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA48	000	Payroll Administration	Provide ability to optionally pay lump sum bonuses in either a separate warrant or in combination with the regular warrant. The user should have the ability to specify deduction processing for lump sum payments.	Fit
PA49	000	Time, Labor, & Leave A	Provide ability for employees to access current pay period, year-to-date payroll detail, withholding information, and leave balances through the use of an industry-standard web browser, and provide for a user-specified lag after payro is confirmed in agency system.	Gap
PA49	321	Payroll Administration	System should allow access to prior months' payroll data as well.	Fit
PA50	000	Payroll Administration	Provide ability to cancel a payment by allowing authorized users to enter certain payment cancellation information. then automatically adjust earnings, deductions, and withholdings. Provide ability to cancel an entire document or allow cancellations for the gross amount, a deduction amount, the net amount, or any partial amount.	Fit
PA51	000	Payroll Administration	Payroll Administration module should update the General Accounting module with summarized transactions to reflect all payroll activity at appropriate account coding distributions according to agency specific General Ledger (GL) & Chartfield Account (CA) coding. PA51 000: Payroll Administration module should update the General Accounting module with summarized transactions to reflect all payroll activity at appropriate account coding distributions. PA52/000 Payroll Administration module should be integrated with the General Accounting module to provide payroll and employee time information by employee for labor distribution purposes. TL02/000 Allow for applying personnel costs to the proper account coding distributions based on prior history of time worked. TL35/000 Integrated with the General Accounting module to provide hours charged to various projects, grants, programs, organizations, and funds for labo distribution purposes. Associate leave used to the account coding distribution actually accrued, and charge accordingly. TL08/017 Employee electronic timesheets must capture the following information: Appropriation Year	Modified Gap
PA51	001	Payroll Administration	Payroll Administration module should update the General Accounting module with summarized transactions to reflect all payroll activity at appropriate account coding distributions according to agency specific GL & CA coding. PA51/000 Payroll Administration module should update the General Accounting module with summarized transactions to reflect all payroll activity at appropriate account coding distributions. PA52/000 Payroll Administration module should be integrated with the General Accounting module to provide payroll and employee time information by employee for labor distribution purposes. TL02/000 Allow for applying personnel costs to the proper account coding distributions based on prior history of time worked. TL35/000 Integrated with the General Accounting module to provide hours charged to various projects, grants, programs, organizations, and funds for labo distribution purposes. associate leave used to the account coding distribution actually accrued, and charge accordingly. TL08/017 Employee electronic timesheets must capture the following information: Appropriation Year	Gap
PA52	000	Payroll Administration	Payroll Administration module should be integrated with the General Accounting module to provide payroll and employee time information by employee for labor distribution purposes.	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA53	000	Payroll Administration	Provide ability to automatically clear all accumulators (earnings, deductions, withholdings, and employer contributions) at calendar, quarterly and fiscal year-end as appropriate and clear month-to-date accumulators at end of month.	Fit
PA54	000	Payroll Administration	Provide ability to (1) process payroll transactions for a new fiscal year before the prior fiscal year is closed, and (2) allow for adjustments to be made to the prior fiscal year after the new fiscal year is started	Fit
PA55	000	Personnel Management	Allow for mass "across the board" changes (with exceptions) to be made to employee data affecting all employees or groups of employees (statewide 5% increase).	Fit
PA56	000	Payroll Administration	Allow retroactive payroll adjustments (if authorized by personnel/payroll officer) for a specific employee or through a global process, such as a position reclassification or "re-grade" of a job classification. Provide the ability to automatically generate retroactive salary adjustments for hourly rates, deduction amounts, etc. automatically generate pre-tax deductions for overpayments or special pay amounts for underpayments.	Fit
PA57	000	Payroll Administration	Automatically accrue liabilities to benefits Providers and tax accounts.	Fit
PA58	000	Payroll Administration	Provide for the electronic transmission of gross wage information in user-defined format that can be used by the Texas Workforce Commission (TWC) to determine unemployment insurance contributions (for Texas State Agencies, TWC determines reimbursed benefits).	Gap
PA59	000	Payroll Administration	Provide self-service "wizard" for assisting State employees in determining their proper Form W-4 tax withholding amounts. The wizard will be accessed through an industry-standard web browser.	Gap
PA59	324	Payroll Administration	The system shall provide for "what if" calculation without posting this data. The system shall provide for the "what if " of all deductions, gross pay and entitlements.	Gap
PA61	000	Payroll Administration	For semi-monthly payroll processing, provide ability to handle "free periods" in which some deductions and entitlements are taken and some are not.	Fit
PA62	000	Payroll Administration	Provide ability to support reciprocal state taxing agreements.	Fit
PA64	000	Payroll Administration	Provide ability to use a mailing address that differs from employee's permanent residence address.	Fit
PA68	000	Payroll Administration	RE PA68/000: Provide ability to interface with the new Standardized Payroll/Personnel Reporting System (SPRS) currently being designed by the Comptroller of Public Accounts (CPA). The new system will be used by agencies instead of interfacing to Human Resource Information System (HRIS) and using the Uniform Statewide payroll/Personnel System (USPS). SPRS will interface with the Uniform Statewide Payroll/Personnel System (USAS) for generating payroll warrants and direct deposit payments. RE PA113/223: The system shall allow use of unique 7-digit (document) number be assigned to each payroll with a unique number for cancels and writes. This number includes a month/year run and feeds both the Financial Management Information System (FMIS) and CPA's system. Currently assigned manually by Fiscal/Payroll. Ideally, voucher numbers (document numbers) should be loaded into a table and assigned automatically. One consideration is that all other payment systems utilize a voucher number (document number). RE PA97/394: The system must allow for the cancellation of the net direct deposit amount when an error occurs after cutoff (this part is a fit). The system must allow the net direct deposit amount to be transferred out of fund 980 with a debit to the original fund/cost center. The system shall provide the information necessary for the generation of a payroll voucher for the same net amount to send to the CPA.	Gap
PA69	000	Payroll Administration	Provide ability to validate employee Earned Income Credit (EIC) eligibility and/or spousal status and process EIC changes.	Fit

Req No	_Seq No_	_Functional Area_	_Requirement Text_	_Fit or Gap_
PA70	000	Payroll Administration	System should provide for appropriate fiscal year-end and calendar year-end conversion processes. Reference tables, which are read when employee data updated, shall be converted from old to new rates and limits. This shall be done on a mass change basis.	Gap
PA71	000	Payroll Administration	utilize the 14-digit TINS number to identify each employee/payee by name and address.	Modified Gap
PA71	359	Payroll Administration	The system shall have the capability to:	Modified Gap
PA71	360	Payroll Administration	§ Generate a valid VIN number and Comptroller Mail code	Modified Gap
PA71	361	Payroll Administration	§ Pass the VIN number to the Comptroller	Fit
PA71	362	Payroll Administration	§ Change the VIN number if requested by the Comptroller or for payments to deceased employees	Fit
PA72	000	Payroll Administration	System should maintain all employee information required for W-2 reporting. System should allow for reporting required employee tax information to federal, state, and local taxing authorities. All statutory items shall be compiled and listed on the W-2 per IRS regulations. A hard copy of the file in detail shall be produced in order to find and correct errors. The creation of the current year W 2 form as approved by the IRS shall be a part of the W-2 process.	Fit
PA73	000	Payroll Administration	Provide a W-2 correction procedure that allows corrections to current and prior year W-2s.	Fit
PA74	000	Payroll Administration	Direct and address payments to the "Estate of" a deceased employee and generate a 1099-MISC and W-2 at year-end.	Gap
PA75	000	Payroll Administration	Provide ability to process credit union deductions according to applicable rules and direct the deductions to multiple credit unions.	Fit
PA76	000	Payroll Administration	Provide ability to process multiple payroll deductions for an employee to a contract number established with the Texas Tomorrow Fund.	Fit
PA77	000	Payroll Administration	Provide ability to process BRP for eligible employees and allow for leveling/not leveling. BRP is subject to FICA taxes, withholding tax, and retirement, and is used in calculating all benefit plans such as insurance salary, 401(k), and 457. monitor for maximum limits for active employees vs. rehired retirees. RE. PM07/073: System must maintain the following employee information, at a miimum - Benefit replacement pay (BRP) amount. RE. PM09/018: Provide ability to track and assign appropriate Human Resource Information System (HRIS) codes that are submitted to the Comptroller of Public Accounts on a monthly basis. Information to be transmitted electronically includes: BRP Eligibility Indicator. RE. PM15/003: System must provide ability to address the following issues regarding re-hires: Eligibility for BRP.	Gap
PA77	366	Payroll Administration	BRP is not subject to retirement if the employee is not ERS eligible.	Fit
PA78	367	Payroll Administration	The system shall calculate an employee's pay based on the employee's base rate of pay (schedule, group, step) multiplied by the percent of time the employee works. This percent is calculated by dividing the average number of hours an employee is scheduled to work in a week by 40 hours.	Modified Gap
PA80	369	Payroll Administration	The system shall provide capability to assure that funds are available to cover payroll by appropriation and by program cost account (PCA) or PCA within each appropriation.	Gap
PA81	370	Payroll Administration	The system shall produce a report of employees with either EXEMPT or having more than 9 deductions listed on their W-4.	Fit
PA82	371	Payroll Administration	The system shall provide the ability to charge administrative fees from payroll deductions as a sub-deduction.The system shall provide the capability to charge an administrative fee as a part of a deduction. The fee would not go to the payee of the deduction, but remain with the agency to offset the administrative cost of the deduction.	Fit
PA83	372	Payroll Administration	The system shall allow certain deductions which are cancelled to be refunded by reducing the next payment to the vendor.	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PA85	374	Payroll Administration	The system shall have the capability to:	Fit
PA85	376	Payroll Administration	§ Reduce an employee's salary in any month by a dollar amount based on the number of leave without pay hours (or pay an employee for a reduced number of hours actually worked + paid leave time);	Modified Gap
PA85	377	Payroll Administration	§ Calculate an hourly rate (and base salary) based on the number of work/holiday hours in a given month (which varies from 160-184 hours).	Modified Gap
PA86	378	Payroll Administration	The system shall be able to combine payroll types (regular, supplemental, overtime, lump sum, manual, etc.) on the same payroll run. There shall be a method to ensure that monthly deductions are only taken on the regular or supplemental pay.	Fit
PA87	379	Payroll Administration	The system shall be able to add overtime or other payments from prior periods to a regular payment and identify the amounts for each payroll type. FIT and FICA shall be taken from the gross amount. Miscellaneous payments that are not combined with regular or supplemental pay amounts shall be taxed at the miscellaneous payment tax rate in force (now 28%.)	Fit
PA89	381	Payroll Administration	The system shall allow re-creation of individual W-2s from 10 previous calendar years, including the W-2 form pertaining to each individual year.	Fit
PA90	382	Payroll Administration	The system shall have the capability to calculate and process for payment the Productivity Bonus awarded by the Texas Incentive and Productivity Commission. The bonus is subject to withholding and FICA taxes.	Fit
PA91	383	Time, Labor, & Leave A	The system shall provide the capability to detect that payment is due and to pay overtime to an employee under the following circumstances:	Modified Gap
PA91	384	Time, Labor, & Leave A	§ the employee separates from the agency	Modified Gap
PA91	385	Time, Labor, & Leave A	§ the employee moves from an FLSA-covered job to an FLSA-non-covered job	Modified Gap
PA91	386	Time, Labor, & Leave A	§ the agency decides to pay all employees (or selected groups of employees) for their overtime	Modified Gap
PA91	387	Time, Labor, & Leave A	§ the employee exceeds 240 hours of overtime (in which case the agency must pay only for those number of hours exceeding 240).	Modified Gap
PA91	388	Time, Labor, & Leave A	The provision must exist to pay employees for all or part of their overtime and the system must be capable of reducing the employee's overtime leave balance by the number of hours paid.	Fit
PA92	389	Payroll Administration	The system shall be able to process partial per diem payrolls for employees and non-employees (such as board members.) PPD for employees shall be part of gross income.	Fit
PA93	390	Payroll Administration	The system shall allow cancellation of an entire payroll and all year-to-date records adjusted accordingly.	Fit
PA95	392	Payroll Administration	The system shall allow changes or additions to employees or new hires any time prior to final payroll processing.	Fit
PA97	394	Payroll Administration	The system must allow for the cancellation of the net direct deposit amount when an error occurs after cutoff. The system must allow the net direct deposi amount to be transferred out of fund 980 with a debit to the original fund/cost center. The system shall provide the information necessary for the generation of a payroll voucher for the same net amount to send to the Comptroller.	Modified Gap
PA98	395	Payroll Administration	The system shall support the reconciliation of tax deposits by the comptroller with tax deductions recorded on each payroll. This information shall be summarized by payroll, monthly, quarterly, annually, CYTD, or any other time period needed for reporting purposes and submission to IRS. The system shall also allow payroll adjustments to correct discrepancies.	Fit
PA99	408	Payroll Administration	The system shall provide the information needed for production and reconciliation of the quarterly IRS form 941.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PC01	000	Position Control	Capture and maintain detail associated with appropriated dollars, authorized FTEs, and internally set agency budgets for each designated coding block element in the data classification structure for which budgets are to be maintained.	Gap
PC01	001	Payroll Administration	Class code	Fit
PC02	000	Position Control	Provide for establishing and maintaining a unique position number for every funded position in the agency.	Fit
PC02	200	Position Control	The unique position number should be for all positions including vacant and filled positions.	Fit
PC03	001	Position Control	Provide a position table to maintain pertinent information about every position in the agency in accordance with the data classification structure established in th General Accounting module.The table must include, but not be limited to, the following:	Fit
PC03	002	Position Control	Position number	Fit
PC03	003	Position Control	Position type (regular full-time, regular part-time, temporary full-time, temporary part-time, temporary services contract, professional services contract, interns)	Fit
PC03	004	Position Control	Agency (if TDH maintains position control information for multiple agencies)	Fit
PC03	006	Position Control	Class title	Fit
PC03	007	Position Control	Functional title (programmatic)	Fit
PC03	008	Position Control	Location/facility code	Fit
PC03	009	Position Control	County code (where position is placed)	Gap
PC03	010	Position Control	Budgeted salary (group with steps, group with range, hourly rates for hourly employees, BRP, and longevity)	Fit
PC03	011	Position Control	Per diem (for Board members)	Fit
PC03	012	Position Control	FTE hours worked per week	Fit
PC03	013	Position Control	Multiple combinations of account coding distribution(s):	Fit
PC03	014	Position Control	Organization	Fit
PC03	015	Position Control	Strategic Program	Fit
PC03	020	Position Control	Contract (Type, Number) (optional)	Fit
PC03	025	Position Control	FLSA status indicator	Fit
PC03	026	Position Control	Essential Functions	Fit
PC03	027	Position Control	Physical Requirements	Fit
PC03	028	Position Control	Managerial / supervisory position indicator	Fit
PC03	029	Position Control	Supervising position number	Fit
PC03	030	Position Control	Subordinate position number(s)	Fit
PC03	031	Position Control	Shift information	Fit
PC03	032	Position Control	Shift differential	Fit
PC03	033	Position Control	Position action (established, reclassified, eliminated, inactivated)	Fit
PC03	034	Position Control	Position action effective date	Fit
PC03	035	Position Control	Position expiration date (last date position is authorized for use)	Fit
PC03	036	Position Control	Comments	Fit
PC03	240	Job Classification Audit	Audit Type (ex: A- Full Audit, R- Reviewed, W-waived)	Modified Gap

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PC03	241	Position Control	EEO Job Categories	Fit
PC03	242	Position Control	Mail Code (4 digits)	Fit
PC04	001	Position Control	Maintain position history for all positions in the Agency. The history must include, but not be limited to, the following:	Fit
PC04	002	Position Control	Position number	Fit
PC04	003	Position Control	Position history	Fit
PC04	004	Position Control	Position type	Fit
PC04	005	Position Control	Agency	Fit
PC04	006	Position Control	Fiscal year	Fit
PC04	007	Position Control	Class code	Fit
PC04	008	Position Control	Class title	Fit
PC04	009	Position Control	Sub-spec code title	Fit
PC04	010	Position Control	Functional title	Fit
PC04	011	Position Control	Location/facility code	Fit
PC04	012	Position Control	History of County code for position.	Fit
PC04	014	Position Control	FTE hours worked per week	Fit
PC04	015	Position Control	Account coding distribution(s)	Fit
PC04	016	Position Control	FLSA status indicator	Fit
PC04	017	Position Control	Managerial / supervisory position indicator	Fit
PC04	018	Position Control	Supervisor	Fit
PC04	019	Position Control	Subordinates	Fit
PC04	020	Position Control	Essential functions	Fit
PC04	021	Position Control	Physical requirements	Fit
PC04	022	Position Control	Shift information	Fit
PC04	023	Position Control	Shift differential	Fit
PC04	024	Position Control	Comments	Fit
PC04	025	Position Control	Action history	Fit
PC04	026	Position Control	Position action (established, reclassified to/from, eliminated)	Fit
PC04	027	Position Control	Position action effective date	Fit
PC04	028	Position Control	Position expiration date (last date position is authorized for use)	Fit
PC04	029	Position Control	Assignment information (multiple occurrences)	Fit
PC04	030	Position Control	Name	Fit
PC04	031	Position Control	Employee number (SSN)	Fit
PC04	032	Position Control	Employee assigned status (active or inactive)	Fit
PC04	033	Position Control	Salary	Fit
PC04	034	Position Control	Per diem	Fit
PC04	035	Position Control	Date employee filled position	Fit
PC04	036	Position Control	Date employee vacated position	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PC04	037	Position Control	Percent of position filled by employee	Fit
PC04	280	Position Control	Employee number (SSN): include a unique employee number and position number as an identifier other than SSN.	Fit
PC04	285	Position Control	The system shall have the capability to provide an external file of position control (BJN) for use by legacy systems. Currently several versions of this file are created daily to provide other systems this information in various sort orders	Fit
PC05	000	Position Control	Provide ability for proposed positions and staffing to be established by the lowest level of the agency and personnel services budget. Proposed positions and staffing shall be at the same level of detail as that of the authorized positions and staffing.	Fit
PC05	152	Personnel Management	We need to duplicate the customizations that we did for the Account Code on the JOB record (Payroll panel) on the Job Earnings Distribution record (Job Earnings Distribution panel).	Gap
PC06	000	Position Control	Provide flexibility for a position to be shared by more than one employee based on percentage of time worked. also allow two employees to fill one position through authorized override capability (incumbent employee on leave of absence and position being filled by another employee in the interim).	Fit
PC07	000	Position Control	Allow for multiple funding sources (coding blocks) for one position with proper split of salary.	Fit
PC08	000	Position Control	Allow for time-limited positions to be established and extended. Provide tickler notifying that the position expires within a user-defined period of time.	Gap
PC09	000	Position Control	Allow for positions to retain all associated history if reclassified.	Fit
PC10	000	Position Control	Provide capability to reclassify positions and change account coding distributions associated with positions and the individuals within those positions on a global basis. maintain a history of all reclassifications.	Fit
PC11	000	Position Control	Provide an edit to prevent an employee from being successfully processed as a new hire without a valid position number.	Fit
PC11	014	Position Control	EEO reporting by position	Fit
PC12	000	Position Control	Provide an edit to prevent overfilling of a position (with override capability).	Fit
PC13	000	Position Control	Provide that new hire or employee change data be edited against the position table for class and salary group/step.	Fit
PC14	000	Position Control	Allow for filling a position on an acting basis with minimal data input requirements.	Fit
PC15	000	Position Control	Provide edits to prevent the salary group from being overridden to a higher or a lower group (with proper override capability).	Fit
PC15	282	Position Control	System must be able to establish an agency's staffing pattern as either "synchronized" (budgeted salary must be the same as the actual salary) or "over fill/under-fill" (budgeted salary may be higher or lower than actual salary).	Fit
PC15	283	Position Control	System should provide warning message to prevent the salary group from being overridden to a higher or a lower group (with proper override capability).	Fit
PC16	000	Position Control	Provide that changes in position control automatically update related personnel/payroll data.	Fit
PC17	000	Position Control	Track vacant positions by date vacated or other user-defined criteria.	Fit
PC17	285	Position Control	Other user-defined criteria should include option to track vacant positions by the last employee to occupy the position.	Fit
PC18	000	Position Control	Track whether a position is eligible for telecommuting.	Modified Gap
PC19	000	Position Control	Provide capability for developing what-if scenarios that Provide support to capture all the details of program funding, requested staffing (FTEs), and internally set agency budgets, and the ability to convert said data to actual budgets.	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PC20	000	Position Control	Provide ability to designate each proposed budget position with the LAR agency level-of-request code, along with the agency preference ranking.	Gap
PC21	000	Position Control	Provide ability to "rolldown" a summary level budget adjustment (agency is requested to reduce its proposed budget by "x" percent or dollars).	Gap
PC23	000	Position Control	Provide ability to distinguish contract employees from true temporary labor and consulting professional services to control against hiring of staff off-payroll.	Fit
PC24	000	Position Control	Provide ability to store and edit against FTE ceilings for certain levels of the organization by level (employee, supervisor, manager) and by budget or program.	Fit
PC25	000	Position Control	Provide the flexibility to model a large organizational structure using organization structure and supervisor/employee relationships.	Fit
PC26	000	Position Control	Provide an agency-level table of classified positions that is a subset of all state-level classifications. Provide ability to add and maintain agency-specific sub-classifications, which roll up into state classifications for payroll and reporting purposes.	Fit
PC27	000	Position Control	Maintain supervisor/employee relationships and Provide on-line edits against the organization code and job function code for the relationship. When a position is created or deleted or a position's function is changed between supervisory, managerial and non-supervisory, the system should facilitate navigation to modify and edit the new relationships.	Fit
PC28	000	Position Control	Provide the capability to link the FLSA status to position and Provide the option to override the FLSA status through the employee assignment.	Fit
PC29	000	Position Control	Provide ability to modify proposed positions and staffing levels so that as the proposed budget planning process evolves it reflects known and planned personnel actions such as promotions, demotions, transfers and terminations. When a proposed position characteristic is changed or a staffing decision is made affecting dollar or FTE amounts during the budget planning process, update projection data to include the new change or planned event.	Gap
PC30	000	Position Control	Provide ability to designate position types (regular full-time, regular part-time, temporary full-time, temporary part-time).	Fit
PC31	000	Position Control	Provide ability to uniquely identify classified, non-classified, true exempt and unclassified (Board members) positions.	Fit
PC32	000	Job Classification Audit	Track the creation, deletion or update of job audits to a specific position.	Modified Gap
PC33	000	Position Control	Assign the same position number for regular pay and supplemental pay.	Fit
PC34	000	Position Control	Provide ability to maintain shift information associated with a position.	Fit
PC35	000	Position Control	Provide the option during fiscal year conversion to update the existing position number with the incumbent class and new fiscal year appropriation, since reclassifications may be entered for incumbents without a new position number with a new class or appropriation for the new fiscal year.	Fit
PC36	000	Position Control	Provide an automated option during fiscal year conversion to change position salary level to minimum if position is vacant at year-end for both group/step and group with range methods.	Gap
PC37	000	Position Control	Provide ability to establish non-FTE positions (temporary help) with one or many incumbents. These positions may or may not be counted in the FTE position or the incumbent count.	Fit
PC38	000	Position Control	Download of strategy detail associated with each version of the Appropriations bill	Gap
PC38	001	Position Control	Provide ability to interface to ABEST. This would essentially automate the existing manual LAR process. The interface should transmit the following to ABEST:	Gap
PC38	002	Position Control	Performance measure definitions	Gap
PC38	003	Position Control	Key performance measure data	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PC38	004	Position Control	ABEST/USAS reconciliation	Gap
PC38	005	Position Control	Entry of Legislative Appropriations Request	Gap
PC39	000	Position Control	Provide ability to link to job description associated with each position for online viewing.	Gap
PC40	000	Position Control	Longevity pay is established and tracked at the employee level. Provide ability to update Position Control module with employee longevity information to ensure proper budgeting of salaries and salary-related expenditures.	Fit
PC41	000	Position Control	Provide ability to perform what if scenarios in a non-production workspace to assist in determining the impact of future funding considerations.	Gap
PC42	001	Position Control	Provide standard production reports that allow agency personnel to monitor all aspects of the position control function, including, but not limited to:	Fit
PC42	002	Position Control	Budget and position utilization reports	Fit
PC42	003	Position Control	LAR proposed schedules reports	Gap
PC42	004	Position Control	Position occupant history reports	Fit
PC42	005	Position Control	Proposed budget and position summary reports	Gap
PC42	006	Position Control	Proposed LAR budgets reports	Gap
PC42	007	Position Control	Proposed staffing and position detail reports	Gap
PC42	008	Position Control	Proposed staffing summary reports	Gap
PC42	009	Position Control	Staffing audit reports	Fit
PC42	010	Position Control	Staffing position detail reports	Fit
PC42	011	Position Control	Staffing summary reports	Fit
PC42	012	Position Control	Staffing to proposed budget comparison reports	Gap
PC42	013	Position Control	Vacancy report	Fit
PC42	015	Position Control	FLSA reporting by position	Fit
PC42	016	Position Control	Management to staff ratio reports	Fit
PC42	017	Position Control	Salary savings reports	Fit
PC43	298	Position Control	An employee and a position must both be associated with a classification (and its attributes such as pay schedule, pay group, FLSA status, etc.) but the classifications for each may be different.	Fit
PC44	299	Job Classification Audit	PeopleSoft needs to record the date (month and year) that a job audit determination was made on a position and the type of audit performed. HRMIS currently uses the following audit codes: A (audited), W (waived), and R (reviewed).	Modified Gap
PC44	300	Job Classification Audit	While audit history is not currently stored on HRMIS, the Classification Unit would like audit history and position history stored.	Modified Gap
PC45	301	Position Control	PeopleSoft must support two different pay schedules labeled 'A' and 'B'.	Fit
PC46	302	Position Control	PeopleSoft shall set up multiple pay groups for Schedules A and B.	Fit
PC46	303	Position Control	At the current time DHS uses seventeen pay groups for Schedule A (2-18) and seventeen pay groups for Schedule B (1-17).	Fit
PC47	304	Position Control	Utilize a fully functional position number in PeopleSoft and yet supply legacy systems with something that they recognize as a BJN. Maintain whatever internal integrity within the BJN that is required either by the legacy systems or by human resources.	Gap
PC47	305	Position Control	Maintain requirements for integrity within the BJN if required by either HR or legacy systems.	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PC49	309	Position Control	PeopleSoft needs to provide the capability to transact mass changes that can be effected OVERNIGHT. The changes need to be able to affect the organization code, cost allocation codes, mail codes, classifications, all associated pay codes and employee/supervisor relationship while at the same time testing for and maintaining internal data integrity.	Fit
PC49	312	Position Control	The history needs to be displayed on a SINGLE screen so that the users can visually COMPARE history positions.	Fit
PM01	001	Personnel Management	Provide a classification table that captures the following data elements at a minimum:	Fit
PM01	002	Personnel Management	Class code, including subspecialties	Fit
PM01	003	Personnel Management	Class title	Fit
PM01	004	Personnel Management	Salary group / step	Fit
PM01	005	Personnel Management	Class EEO-4 code	Fit
PM01	006	Personnel Management	Class function code (class family, function code)	Fit
PM01	007	Personnel Management	Shift differential eligibility	Fit
PM01	008	Personnel Management	Cost-of-living allowance	Fit
PM01	010	Personnel Management	Effective date	Fit
PM02	000	Personnel Management	Recognize and support the multiple categories of state employment (classified, unclassified) and Provide a compensation table that supports each.	Fit
PM03	001	Personnel Management	Provide a compensation table that captures the following data elements at a minimum:	Fit
PM03	002	Personnel Management	Schedule A:	Fit
PM03	003	Personnel Management	Schedule A: Salary group	Fit
PM03	004	Personnel Management	ScheduleA: Step	Fit
PM03	005	Personnel Management	Schedule A: Annual	Fit
PM03	006	Personnel Management	Schedule A: Monthly	Fit
PM03	007	Personnel Management	Schedule A: Hourly	Fit
PM03	008	Personnel Management	Schedule A: Effective date	Fit
PM03	009	Personnel Management	Schedule B:	Fit
PM03	010	Personnel Management	Schedule B: Salary group	Fit
PM03	011	Personnel Management	Schedule B: Minimum Salary	Fit
PM03	012	Personnel Management	Schedule B: Annual	Fit
PM03	013	Personnel Management	Schedule B: Monthly	Fit
PM03	014	Personnel Management	Schedule B: Hourly	Fit
PM03	015	Personnel Management	Schedule B: Maximum Salary	Fit
PM03	016	Personnel Management	Schedule B: Annual	Fit
PM03	017	Personnel Management	Schedule B: Monthly	Fit
PM03	018	Personnel Management	Schdule B: Hourly	Fit
PM03	019	Personnel Management	Effective date	Fit
PM03	020	Personnel Management	Exempt:	Fit
PM03	021	Personnel Management	Salary	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM03	022	Personnel Management	Effective date	Fit
PM03	023	Personnel Management	For per diem employees:	Fit
PM03	024	Personnel Management	Salary	Fit
PM03	025	Personnel Management	Effective date	Fit
PM03	210	Personnel Management	DHS requires steps on Schedule B	Fit
PM03	211	Personnel Management	Add a schedule A without the pay increase for those not having 12 months of state service. Add a schedule B without the pay increase for those not having 12 months of state service	Fit
PM04	000	Personnel Management	Allow for processing mass changes to the compensation table by authorized entry of a change percentage or fixed dollar increase, or some combination thereof.	Fit
PM05	001	Time, Labor, & Leave A	Provide a table to facilitate establishment of various workweek schedules to include:	Fit
PM05	002	Time, Labor, & Leave A	Begin day / days of week	Fit
PM05	003	Time, Labor, & Leave A	Begin Time / number of hours per day	Fit
PM05	004	Time, Labor, & Leave A	Provide a table to facilitate establishment of various workweek schedules to include: Primary activity	Gap
PM05	005	Time, Labor, & Leave A	Effective date of schedule	Fit
PM05	130	Personnel Management	The system shall carry a 5-digit number to be associated with payment to an employee. This number points to an 'account' from which the employees' net salary is drawn from the state treasury. Does not affect deductions. The system shall be able to limit use of PCAs to specific organizations. Edit against valid PCAs. All TDHS payment systems use PCAs. History and text description would be extremely helpful in reporting.	Fit
PM05	140	Personnel Management	Certain personnel actions are not required by the Comptroller to be reported, but are required for agency purposes. (An example is an employee change from one position to another with no change in classification or salary.) These transactions must be processed, edited against agency standards, and maintained in transaction history in a format that is useful to the users.	Fit
PM05	141	Personnel Management	All personnel transactions need to be edited for conformance with both State and agency requirements. It would be preferable for these edits to take place on-line, real-time, but it may be more practical to perform reporting after the fact. If after the fact reporting is utilized, that methodology needs to be coordinated with payroll tests and deadlines.	Gap
PM05	145	Personnel Management	The system shall provide for a "not to exceed" compensation rate within a specified job code which allows a lesser or greater rate for the same job code. (Prof. Trainees Article II)	Modified Gap
PM05	151	Personnel Management	Need PeopleCode for special processing rules associated with Action/Action Reason Codes.	Modified Gap
PM05	155	Personnel Management	For purposes of paper warrant distribution the system shall maintain a list of mail codes/office locations and responsible parties. PA051	Fit
PM07	001	Personnel Management		Fit
PM07	002	Personnel Management	Employee number (SSN)	Fit
PM07	003	Personnel Management	Employee name	Fit
PM07	004	Personnel Management	Position(s) assigned	Fit
PM07	005	Personnel Management	Percentage of time in each position	Fit
PM07	017	Position Control	Grant year	Fit
PM07	018	Position Control	Grant budget category	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM07	019	Position Control	Sub Grantee	Fit
PM07	021	Personnel Management	Date of birth	Fit
PM07	023	Time, Labor, & Leave A	Time reporting profile indicator (identifies whether employee positively reports hours or reports exceptions only; defaults to exception reporting)	Fit
PM07	024	Personnel Management	Marital status	Fit
PM07	025	Personnel Management	Veteran's status	Fit
PM07	026	Personnel Management	Gender	Fit
PM07	027	Personnel Management	Ethnic group	Fit
PM07	028	Personnel Management	Disability	Fit
PM07	030	Personnel Management	Special accommodations	Fit
PM07	031	Personnel Management	County of residence	Fit
PM07	032	Personnel Management	Citizenship information (I-9 information, visa status, visa end date, work permit)	Fit
PM07	033	Personnel Management	The system must maintain the following employee information: Confidential address indicator (protects confidentiality of home address at employee's request. W-2 forms are excluded. Other mail must be directed to business address.)	Gap
PM07	034	Personnel Management	Residence address	Fit
PM07	043	Personnel Management	Home mailing address	Fit
PM07	044	Personnel Management	Home phone number	Fit
PM07	045	Personnel Management	Business address	Fit
PM07	046	Personnel Management	Business phone number	Fit
PM07	047	Personnel Management	Pager	Fit
PM07	048	Personnel Management	Cellular phone	Fit
PM07	049	Personnel Management	Facsimile	Fit
PM07	050	Personnel Management	Electronic mail address	Fit
PM07	051	Personnel Management	Employee type (regular full-time, regular part-time, temporary full-time, temporary part-time, hourly full-time, hourly part-time, exempt)	Fit
PM07	053	Time, Labor, & Leave A	Flextime schedule (if applicable)	Fit
PM07	054	Personnel Management	PM07 054 System must maintain the following employee information: Telecommuting information, (including % of time) ER99 275 System must have the ability to track when an employee is on Workers' Compensation.	Gap
PM07	055	Personnel Management	Supervisor	Fit
PM07	056	Personnel Management	Employment history	Fit
PM07	057	Personnel Management	Prior State employment	Fit
PM07	058	Personnel Management	All State employment history	Fit
PM07	059	Personnel Management	Temporary employment (E) / assignment (A) indicator	Fit
PM07	060	Personnel Management	Begin date	Fit
PM07	061	Personnel Management	End date	Fit
PM07	062	Personnel Management	Separation information	Fit
PM07	063	Personnel Management	Termination date	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM07	064	Personnel Management	Termination time	Gap
PM07	065	Personnel Management	The system must main the following employee information: Transferred to (see changes in comments field)	Fit
PM07	066	Personnel Management	Termination code	Fit
PM07	067	Personnel Management	Termination description	Fit
PM07	068	Personnel Management	Eligibility for Rehire	Fit
PM07	070	Personnel Management	Compensation information	Fit
PM07	071	Personnel Management	Salary or hourly rate	Fit
PM07	072	Personnel Management	Longevity	Fit
PM07	073	Payroll Administration	Benefit replacement pay (BRP) amount	Modified Gap
PM07	074	Time, Labor, & Leave A	Shift differential	Fit
PM07	075	Personnel Management	Hourly rate	Fit
PM07	076	Personnel Management	Maintain the following employee information, at a minimum: Board member compensation	Fit
PM07	077	Personnel Management	Quarters pay	Fit
PM07	078	Personnel Management	Medical trust pay	Fit
PM07	079	Personnel Management	Uniform allowances	Fit
PM07	080	Personnel Management	Cost-of-living allowance	Fit
PM07	081	Personnel Management	Pay period (monthly or semi-monthly)	Fit
PM07	082	Personnel Management	Work locations (multiple)	Fit
PM07	083	Personnel Management	Time employed toward probationary status	Fit
PM07	084	Personnel Management	Date probationary or extended probationary period ends	Fit
PM07	085	Personnel Management	Reason for extension of probation	Gap
PM07	086	Personnel Management	Federal income tax information (W-4 info -- marital status, exemptions)	Fit
PM07	087	Personnel Management	Earned income credit information (W-5 form)	Fit
PM07	088	Personnel Management	FICA information	Fit
PM07	089	Personnel Management	Longevity information	Fit
PM07	090	Personnel Management	The system shall provide the capability to maintain and calculate an effective continuous state service date based on prior state service dates.	Modified Gap
PM07	091	Personnel Management	Total service as State employee	Fit
PM07	092	Personnel Management	Time within agency	Fit
PM07	093	Personnel Management	Time within position	Fit
PM07	094	Personnel Management	Time within classification	Fit
PM07	095	Personnel Management	Maintain the following employee information, at a minimum: Benefits information	Fit
PM07	117	Base Benefits	Parental leave	Fit
PM07	118	Personnel Management	Performance evaluation information:	Fit
PM07	119	Personnel Management	Evaluation date	Fit
PM07	120	Personnel Management	Reason for evaluation (3-month, 6-month, annual, etc.)	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM07	121	Personnel Management	Date of next evaluation	Fit
PM07	216	Position Control	The system needs an equivalent to the USPS Organization Code.	Fit
PM07	220	Time, Labor, & Leave A	Add "Education, Red Cross, Wellness Bonus Day, and Administrative Leave for Disciplinary Action" to list of employee information.	Fit
PM07	448	Personnel Management	Add: Evaluation rating and rating history.	Fit
PM07	449	Time, Labor, & Leave A	Leave accruals are based on length of state service at the first of the month. This implies that whatever option is chosen for leave accruals, the accruals hav to be updated as of the first of the month or a method has to be available to determine state service as of the first of the month.	Modified Gap
PM07	450	Payroll Administration	RE PM07/450: Longevity eligibility (dollar amount) is based on length of state service on the first of the month. This implies that whatever option is chosen for longevity eligibility, the dollar amount has to be updated as of the first of the month or a method has to be available to determine state service as of the first of the month. RE PA04/234: System should calculate longevity automatically based on total state service.	Gap
PM07	451	Personnel Management	Eligibility for benefit replacement pay (BRP), also covered in the payroll module, is based on an employee having been employed with the State on August 31, 1995 and having not left State employment for a period exceeding a year since that date. Since the current DHS system retains 'from' and 'to' service dates, human resources is able to generate an error report listing possible BRP errors. (In the past this report has uncovered a substantial number of errors.) If 'from' and 'to' dates are not utilized on PeopleSoft the capability for generating such a report will either be lost or made substantially more difficult.	Modified Gap
PM07	452	Personnel Management	DHS currently tracks an employee's merit status with the aid of our current automated system, HRMIS. In general, employees are assigned a 'probationary' merit status for an initial probationary period (six months for all employees except LTCR surveyors, workers, and FSAB workers for whom the probationary period is twelve months. (Higher paid agency employees have an exempt status.) After successful completion of the probationary period the employee's status is changed to 'regular'.	Fit
PM07	453	Personnel Management	An employee who has a regular merit status and separates from DHS has reinstatement rights to regular status for a period of time equal to the employee's probationary and regular status.	Fit
PM07	454	Personnel Management	The system shall allow evaluation ratings to be recorded and maintained. DHS currently uses two different ratings systems.	Fit
PM07	455	Time, Labor, & Leave A	Include leave for voting and educational purposes. Include overall employee performance rating.	Fit
PM07	458	Personnel Management	This requirement should also include: Language Interpreter pay, Fire Brigade Pay, and Maximum Security Pay.	Fit
PM07	459	Personnel Management	The system should not track marital status. This information is not captured in USPS.	Fit
PM08	000	Security	Provide ability to designate any of the elements in PM7 as confidential and restrict access accordingly through security.	Gap
PM09	001	Personnel Management	Provide ability to track and assign appropriate Human Resource Information System (HRIS) codes that are submitted to the Comptroller of Public Accounts on a monthly basis. Information to be transmitted electronically includes:	Fit
PM09	002	Personnel Management	Employee descriptive information	Fit
PM09	003	Personnel Management	Employee name	Fit
PM09	004	Personnel Management	Race	Fit
PM09	005	Personnel Management	Gender	Fit
PM09	006	Personnel Management	Birthdate	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM09	007	Personnel Management	System must maintain the following employee information: Selective Service registration status	Gap
PM09	008	Personnel Management	Veteran's status	Fit
PM09	009	Personnel Management	Mailing address	Fit
PM09	010	Personnel Management	Employee data release indicator	Modified Gap
PM09	011	Personnel Management	Employee job information	Fit
PM09	012	Personnel Management	Class code	Fit
PM09	013	Personnel Management	Salary base	Fit
PM09	014	Personnel Management	Salary group	Fit
PM09	015	Personnel Management	Salary step	Fit
PM09	016	Personnel Management	Pay cycle	Fit
PM09	017	Personnel Management	Assigned work hours	Fit
PM09	018	Payroll Administration	BRP eligibility indicator	Modified Gap
PM09	019	Personnel Management	Retirement code	Fit
PM09	020	Personnel Management	Employee job status changes (only for employees that receive state benefits):	Fit
PM09	021	Personnel Management	Date of hire	Fit
PM09	022	Personnel Management	Date of termination	Fit
PM09	024	Personnel Management	Provide ability to track and assign appropriate Human Resource Information System (HRIS) codes that are submitted to the Comptroller of Public Accounts on a monthly basis. Information to be transmitted electronically includes: Employee entitlements changes (add, change, delete, or stop)	Fit
PM09	025	Personnel Management	Clothing allowance	Fit
PM09	026	Personnel Management	Cost of living salary supplement	Fit
PM09	027	Personnel Management	Housing allowance	Fit
PM09	028	Personnel Management	Longevity pay	Fit
PM09	029	Personnel Management	Medical trust pay	Fit
PM09	030	Personnel Management	Miscellaneous entitlements	Fit
PM09	031	Personnel Management	Night shift pay differential	Fit
PM09	032	Personnel Management	Employee SSN change code	Modified Gap
PM09	033	Personnel Management	Legislative increase codes	Fit
PM09	034	Personnel Management	Legislative reallocation codes	Fit
PM09	035	Personnel Management	September reclassifications Monthly reclassifications – other than September	Fit
PM09	036	Personnel Management	Employee acquisition (new hire) codes	Fit
PM09	037	Personnel Management	Salary action codes	Fit
PM09	038	Personnel Management	Intra-agency multiple employment codes	Fit
PM09	039	Personnel Management	Employee information change codes	Fit
PM09	040	Personnel Management	Employee termination codes	Fit
PM09	461	Personnel Management	The system needs to be able to have both reason codes and extended reason codes as allowed for in USPS. This would allow tracking of personnel action reasons in greater detail than is allowed in USPS and HRIS.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM09	558	Personnel Management	Is "Selective Service registration status" required employee descriptive information on Comptroller of Public Accounts automated system?	Gap
PM10	000	Personnel Management	Support the tracking of employment eligibility verification (I-9s).	Fit
PM11	000	Personnel Management	support the tracking of registration with selective service for all qualifying personnel.	Modified Gap
PM12	001	Personnel Management	Provide ability to access information in the employee information table(s) by:	Fit
PM12	002	Personnel Management	Employee name	Fit
PM12	003	Personnel Management	Employee number (SSN)	Fit
PM12	004	Personnel Management	Position number	Fit
PM12	005	Personnel Management	Organization	Fit
PM12	006	Personnel Management	Strategic program	Fit
PM12	007	Personnel Management	Class code	Fit
PM13	000	Personnel Management	Provide tickler to warn of employees occupying a temporary position for six (6) months.	Fit
PM14	000	Personnel Management	Provide ability to process all types of appointments (new hire, re-hire).	Fit
PM15	001	Personnel Management	Provide ability to address the following issues regarding re-hires:	Fit
PM15	002	Personnel Management	Reason for prior termination	Fit
PM15	003	Payroll Administration	Eligibility for BRP	Modified Gap
PM15	004	Personnel Management	Prior state service	Fit
PM15	008	Personnel Management	Determination as to whether rehire is a State retiree	Fit
PM15	463	Personnel Management	In some instances employees who separate from the agency may owe the agency money. This can happen due to errors in leave audits, the timing between when information is submitted to HR and when the employee's pay is processed, in connection with advance travel, etc. (This does NOT include recovery of student loans.) In instances where the agency is unable to quickly recover money owed to the state, a code is entered onto the employee's record indicating that the employee owes the State money. An employee who owes the State money is prohibited (by agency rules) from being rehired until the debt is cleared. PeopleSoft should provide an appropriate indicator code.	Fit
PM16	000	Personnel Management	Allow for the tracking of variable probationary periods for new hires or after promotions. Provide ability to extend a probationary period or initiate a new probationary period when an employee takes a new position within six (6) months of his/her initial start date with the agency.	Fit
PM16	471	Personnel Management	The system should have a "tickler" to prompt the supervisor when an employee's probationary period is about end. This would alert the supervisor to the need to complete the required evaluation and recommend removal from or continuation on probation.	Fit
PM16	472	Personnel Management	System must allow for the tracking of variable probationary periods for new hire or after promotions. System should provide ability to extend a probationary period or initiate a new probationary period when an employee takes a new position within six (6) months of his/her initial start date with the agency.	Fit
PM17	000	Personnel Management	Allow new hire processing to cross multiple functions (benefit plan enrollment, classification, payroll, position control, employment personal data).	Fit
PM18	000	Personnel Management	Provide edit for duplicate employee numbers.	Fit
PM18	474	Personnel Management	The system should not allow more than one employee to occupy a single position at the same time.	Fit
PM19	000	Personnel Management	check position control table to ensure employee's assigned position number is valid and authorized to be filled.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM19	475	Personnel Management	System should also allow positions to be double filled.	Fit
PM20	001	Personnel Management	Provide ability to process the following personnel actions with required edits:	Modified Gap
PM20	002	Personnel Management	New hire	Modified Gap
PM20	003	Personnel Management	Transfer (lateral)	Modified Gap
PM20	004	Personnel Management	Transfer (promotion)	Modified Gap
PM20	005	Personnel Management	Transfer (demotion)	Modified Gap
PM20	006	Personnel Management	Transfer (classified to unclassified)	Modified Gap
PM20	007	Personnel Management	Transfer (classified to exempt)	Modified Gap
PM20	008	Personnel Management	Promotion	Modified Gap
PM20	009	Personnel Management	Demotion	Modified Gap
PM20	010	Personnel Management	Merit increase	Modified Gap
PM20	011	Personnel Management	Leave without pay	Modified Gap
PM20	012	Personnel Management	Leave of absence	Modified Gap
PM20	013	Personnel Management	Reclassifications	Modified Gap
PM20	014	Personnel Management	Terminations	Modified Gap
PM20	015	Personnel Management	Percent of time change	Modified Gap
PM20	016	Personnel Management	Name change	Modified Gap
PM20	017	Personnel Management	Change of headquarters	Modified Gap
PM20	018	Personnel Management	Change of FLSA status	Modified Gap
PM20	476	Personnel Management	The system should include processing of personnel actions for one-time merit payments, enhanced compensation awards, job classification changes, EEO status changes, FLSA status changes, difference between demotion causing loss of pay and demotion actions not resulting in loss of pay (USPS reason codes 021 and 023 respectively).	Fit
PM21	001	Personnel Management	Provide for efficient processing of transfers whereby employee information, including historical data, is automatically transferred with employee. Employee information transferred with the employee includes:	Fit
PM21	002	Personnel Management	Leave balances	Fit
PM21	003	Personnel Management	Class	Fit
PM21	004	Personnel Management	Group/step (or group/range)	Fit
PM21	005	Personnel Management	Insurance coverage	Fit
PM21	006	Personnel Management	Texas Protects optional whole life coverage	Fit
PM21	007	Personnel Management	401(k) deferred compensation and outstanding loans	Fit
PM21	008	Personnel Management	457 deferred compensation	Fit
PM21	009	Personnel Management	Eligibility for BRP	Fit
PM21	010	Personnel Management	BRP leveling	Fit
PM21	011	Personnel Management	Longevity pay	Fit
PM21	012	Personnel Management	Charitable contribution information	Fit
PM21	013	Personnel Management	Leave of absence information	Fit
PM21	014	Personnel Management	Dates of employment / termination date	Fit

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PM21	015	Personnel Management	Direct deposit information	Fit
PM21	496	Personnel Management	System must provide for child support, IRS tax levy, bankruptcy and student loan payment information to transfer with the employee	Fit
PM21	512	Personnel Management	The requirement should include: TexFlex, Tax Sheltered Annuities (403b), Membership Fees, Prepaid College Tuition, and Permanent Life Insurance.	Fit
PM22	001	Personnel Management	For transferring employees, the system should ensure that:	Fit
PM22	002	Personnel Management	Employee balances in year-to-date accumulators are retained after the transfer for taxing purposes.	Fit
PM22	003	Personnel Management	Earnings prior to the transfer are attributed to the old position.	Fit
PM23	000	Personnel Management	Provide ability to process personnel actions with future effective dates.	Fit
PM24	000	Personnel Management	Provide reason codes for documenting intent of personnel actions (transfers, demotions, salary grade changes, and separation).	Fit
PM24	516	Personnel Management	System should also provide for extended reason codes, as in USPS. This would allow agencies to more accurately track personnel actions.	Fit
PM25	000	Personnel Management	Provide ability to process changes to employee records with future effective dates.	Fit
PM26	000	Personnel Management	Allow for the reversal or voiding of personnel actions.	Fit
PM28	001	Personnel Management	Provide ability to maintain appropriate data to support the following federal reporting requirements:	Fit
PM28	002	Personnel Management	Equal Employment Opportunity (EEO)	Fit
PM28	003	Personnel Management	Job category	Fit
PM28	004	Personnel Management	Race	Fit
PM28	005	Personnel Management	Gender	Fit
PM28	006	Personnel Management	SSN	Fit
PM28	007	Personnel Management	Name	Fit
PM28	008	Personnel Management	American Disabilities Act (ADA)	Fit
PM28	009	Personnel Management	Special needs	Fit
PM28	010	Personnel Management	Veteran's preference	Fit
PM28	519	Personnel Management	Edits should be in place to protect the confidentiality of ADA information for employees.	Fit
PM29	000	Personnel Management	Provide ability to process multiple personnel actions for a given employee in a single pay period (in effective date order).	Fit
PM30	000	Personnel Management	Provide ability to generate mailing labels by agency, division, pay location, etc. or download address information to standard PC applications.	Fit
PM31	000	Personnel Management	Calculate and monitor employee turnover rates by job classification, location, and other user-defined criteria.	Fit
PM31	520	Personnel Management	System should calculate by classification series.	Fit
PM32	001	Personnel Management	Support web-based employee self service functionality for changes to selected parts of employee records:	Fit
PM32	002	Personnel Management	Employee name	Fit
PM32	003	Personnel Management	Employee address	Fit
PM32	004	Personnel Management	Withholdings	Fit
PM32	005	Personnel Management	Benefits enrollment or changes	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM32	007	Personnel Management	Beneficiary information	Fit
PM32	008	Personnel Management	Driver's license number	Fit
PM32	521	Personnel Management	Changes to withholding information require a source document - W4 signed by the employee. Would the system provide such a source document?	Fit
PM32	522	Personnel Management	Driver's license number should also allow a state issued identification card number for employees who do not have a driver's license.	Fit
PM32	523	Personnel Management	System should not allow web-based employee self service functionality for changes to selected parts of employee records: Employee name, address, withholdings, benefit enrollment or changes, remittance advice, beneficiary information or driver's license number.	Fit
PM32	524	Personnel Management	Mail code	Gap
PM32	525	Personnel Management	Emergency contact	Fit
PM32	526	Personnel Management	Home phone number	Fit
PM32	527	Personnel Management	Direct deposit	Fit
PM32	531	Personnel Management	Work Phone number	Fit
PM33	000	Personnel Management	Provide for the establishment and maintenance of emergency contact information about employees.	Fit
PM34	000	Personnel Management	Provide tickler function to notify authorized agency personnel officers when an employee is approaching possible retirement age.	Fit
PM36	000	Personnel Management	Provide tickler function to notify authorized agency personnel officer of upcoming employee anniversary date on the effective date and possible anniversary increase.	Fit
PM36	533	Personnel Management	TDHS needs further explanation to understand the purpose of this requirement.	Gap
PM36	534	Personnel Management	Anniversary date: Please define anniversity date, whether initial employment date or an action anniversary date.	Gap
PM36	535	Personnel Management	The system should process this requirement in an automated manner.	Gap
PM37	000	Personnel Management	Provide tickler function to notify authorized agency personnel officer that the period of employment for a temporary employee or temporary assignment will expire on the effective date.	Fit
PM40	001	Personnel Management	Provide "tickler" function to notify authorized personnel staff that required employment forms are in pending status (have not been completed and approved):	Fit
PM40	002	Personnel Management	Immigration I-9 form with copies of required supporting documentation	Fit
PM40	003	Personnel Management	State of Texas application for employment	Fit
PM40	004	Personnel Management	Veteran's status reporting form	Fit
PM40	005	Personnel Management	Confidential emergency data form	Fit
PM40	006	Personnel Management	Employee confidentiality agreement	Fit
PM40	007	Personnel Management	Certificate of state officer or employee/conflict of interest disclosure	Fit
PM40	008	Personnel Management	Statistical data sheet	Fit
PM40	009	Personnel Management	Auto license form (for Austin employees only)	Fit
PM40	010	Personnel Management	Prior state service form	Fit
PM40	011	Personnel Management	Choice regarding release of information	Fit
PM40	012	Personnel Management	Certification of eligibility for benefit replacement pay	Fit
PM40	013	Personnel Management	Retirement system beneficiary form	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM40	014	Personnel Management	Withholding certificate	Fit
PM40	015	Personnel Management	Copies of social security card	Fit
PM40	016	Personnel Management	Dual employment authorization	Fit
PM40	536	Personnel Management	The "tickler" function should include all of the listed employment forms, but not be limited to just the forms listed. (Examples of additional employment forms include, but are not limited to, insurance beneficiary forms, state required acknowledgments, agency specific forms, etc.)	Fit
PM41	538	Personnel Management	The history needs to be displayed on a SINGLE screen so that the users can visually COMPARE history positions.	Fit
PM42	539	Personnel Management	TDHS occasionally (usually at the fiscal year boundary) has the need to make mass changes to employee classifications, mail codes, organizational structure, supervisory units, PACs/PCAs, etc. HRMIS currently provides a facility for effecting these mass changes, but the process on PeopleSoft will be much more complex due to utilization of supervisor/employee relationship.	Fit
PM42	540	Personnel Management	The agency needs the capability to set up these changes prior to the effective date, run test conversions and produce output with error reports, and then effect the actual changes within a window of less than 24 hours.	Fit
PM44	543	Personnel Management	PeopleSoft needs to maintain transaction history in a useful format. In general, we need to be able to easily compare relevant portions of history positions to determine when changes were made.	Fit
PM45	544	Personnel Management	The entry level 'worker' jobs are audited at the 'Worker I' level. New employees are hired into the jobs at a trainee level (generally two salary steps below the worker level) for a twelve month period. At the end of a successful probationary period the employee is automatically promoted from the trainee level to the audited worker level.	Gap
PM45	545	Personnel Management	We require the ability to process these type actions automatedly.	Gap
PM45	546	Personnel Management	A printout listing those employees who are to be promoted from trainee to worker in the current month is produced for distribution to the regions. The actual automated update on HRMIS occurs two nights before payroll runs so that the regions have the opportunity to enter any other personnel actions for the month before payroll runs.	Fit
PM46	547	Personnel Management	DHS has an internal policy that makes employees in program Supervisor I eligible for 'automatic' upgrade to Supervisor II or III after certain criteria are met. Each month a report of program Supervisors I who are potentially eligible is produced and distributed to the regions. The regions review the report and submit personnel actions for eligible supervisors. The personnel actions are manually entered in HRMIS.	Fit
PM47	548	Personnel Management	DHS has an internal policy that makes employees classified as Workers I eligible for 'automatic' upgrade to Worker II or III after certain criteria are met. Each month a report of Workers I who are potentially eligible is produced and distributed to the regions. The regions review the report and submit personnel actions for eligible Workers. The personnel actions are then manually entered in HRMIS.	Fit
PM48	549	Personnel Management	The system shall allow a manual override of performance evaluation dates so that exceptions can be accommodated. Once set to a different date, the system establishes new dates based on a year from the exception date.	Fit
PM49	550	Personnel Management	If an evaluation is not recorded on the system by the due date (or within some grace period), the system needs to be capable of generating monthly notices of evaluations due and overdue. The current system uses paper reports for this purpose but would like the PeopleSoft notice to be electronic.	Fit
PM50	551	Personnel Management	HRMIS currently generates paper reports that are reminders to supervisors that evaluations are due. These reports are generated so that supervisors receive a two-month notice and a one-month notice of evaluations that are due. Although current notices are paper, TDHS would like the notice to be electronic.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
PM52	553	Personnel Management	The system, using position numbers and requiring a minimal amount of user effort, should maintain the relationships between supervisors and employees. Ideally, there should be some safeguard to ensure internal integrity by referencing the organization code.	Fit
PM52	554	Personnel Management	There should exist some method of easily utilizing the supervisor/employee relationship in the security tables so that changes in relationships do not have to be entered twice, once for human resources and again for security.	Fit
PM52	555	Personnel Management	Successful integration of this requirement should eventually allow the agency to provide the security necessary to perform electronic report distribution, supervisory notices, and facilitate implementation of an improved time and leave system.	Fit
PM99	559	Personnel Management	PM99 559: The system shall provide the capability to calculate an effective state service date based on prior state service dates. PA08 244: System must identify six months continuous service PM07 090: The system shall provide the capability to maintain and calculate an effective continuous state service date based on prior state service dates. PM07 451: Eligibility for benefit replacement pay (BRP), also covered in the payroll module, is based on an employee having been employed with the State on August 31, 1995 and having not left State employment for a period exceeding a year since that date. Since the current DHS system retains 'from' and 'to' service dates, human resources is able to generate an error report listing possible BRP errors. (In the past this report has uncovered a substantial number of errors.) If 'from' and 'to' dates are not utilized on PeopleSoft the capability for generating such a report will either be lost or made substantially more difficult.	Gap
PM99	560	Personnel Management	The system shall provide capability for an employee to be actively employed in more than one position within the same agency.	Fit
PM99	561	Personnel Management	The system shall provide ability to access employee information by SSN, phonetic spelling of the name or position number.	Fit
PM99	562	Personnel Management	Employment Verifications - The system will provide the ability to define employment verification screens according to subject matter(I.e. employment, mortgage).	Gap
PM99	563	Personnel Management	System should track employees who are in acting position status. Acting status cannot continue longer than six months.	Fit
RP01	001	Reporting And Inquiry	The delivered reports do not fully meet the reporting business process needs of the HHSC agencies.	Gap
RP01	002	Reporting And Inquiry	Standard reports and inquiries (that will become available for recurring use)	Fit
RP01	003	Reporting And Inquiry	Ad hoc reports and inquiries (to be either created on the fly or selected from a library of as needed reports)	Fit
RP01	004	Reporting And Inquiry	Extract tools (which format extract data for use in standard desktop reporting tools)	Fit
RP01	005	Reporting And Inquiry	Drill down query capabilities	Fit
RP01	006	Reporting And Inquiry	Full integration with Microsoft Office applications	Fit
RP01	007	Reporting And Inquiry	Automated report distribution facility for all production and ad hoc reports and inquiries	Fit
RP02	001	Reporting And Inquiry	Provide that all reporting tools are supported by online help facilities that Provide the following:	Fit
RP02	002	Reporting And Inquiry	Field level help	Fit
RP02	003	Reporting And Inquiry	Reporting level help	Fit
RP02	004	Reporting And Inquiry	Windows type hypertext help facility	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
RP02	005	Reporting And Inquiry	"Ad-hoc tool" has wizards to guide users through reporting building steps	Fit
RP02	006	Reporting And Inquiry	"System" has wizards to guide users through reporting building steps	Fit
RP02	007	Reporting And Inquiry	Cursor selection of files, elements, and operands (+,-, /, *) from data dictionary or other pre-established lists	Fit
RP02	008	Reporting And Inquiry	Graphical report layout tools to assist users in formatting reports and inquiries	Fit
RP02	009	Reporting And Inquiry	User friendly means of specifying form of output and distribution (distribute to named users through email, print at local printer, print at remote printer, distribute as data file through specified medium of transmission, etc.).	Fit
RP03	010	Reporting And Inquiry	Provide ability for off-site offices to request and generate their own reports.	Fit
RP04	000	Reporting And Inquiry	Support files transfer (FTP) and other industry-standards file transmission protocols.	Fit
RP05	001	Reporting And Inquiry	Standard Reports and Inquiries	Fit
RP05	002	Reporting And Inquiry	Provide a standard reporting/inquiry library to meet routine reporting and analysis needs.	Fit
RP06	000	Reporting And Inquiry	Provide summary inquiry screens linked to detail history screens to Provide a rapid display of requested information with the most current record displayed at the top of the screen.	Fit
RP07	000	Reporting And Inquiry	Provide ability for authorized users to select specific reports and report options (level of detail, reporting period, report sequence, report frequency) online with report generation occurring at the time of the request unless the report is processing intensive. Report requests must not lock up client workstations.	Fit
RP08	000	Reporting And Inquiry	Provide controls to ensure that processing intensive reports are only generated during nightly batch processing or at some other time when adequate computer resources are available.	Fit
RP09	001	Reporting And Inquiry	Provide the following inquiry capabilities:	Fit
RP09	002	Reporting And Inquiry	Pre-packaged on-line inquiries which can be accessed via menu or icons	Fit
RP09	003	Reporting And Inquiry	Drilldown inquiries	Fit
RP09	004	Reporting And Inquiry	Ability to automatically invoke online chart and graphical views of inquiry data	Fit
RP10	001	Reporting And Inquiry	Provide ability to inquire or report on activity at any level within the data classification structure and through a combination of structures:	Fit
RP10	002	Reporting And Inquiry	Organization	Fit
RP10	003	Reporting And Inquiry	Strategic Program	Fit
RP10	004	Reporting And Inquiry	Appropriation Year	Fit
RP10	005	Reporting And Inquiry	Method of Finance	Fit
RP10	006	Reporting And Inquiry	PCA (USAS Required)	Fit
RP10	007	Reporting And Inquiry	Agency Budget Category	Fit
RP10	008	Reporting And Inquiry	Contract (optional)	Fit
RP10	009	Reporting And Inquiry	Appropriation Number	Fit
RP10	010	Reporting And Inquiry	Fund	Fit
RP10	011	Reporting And Inquiry	Grant (optional)	Fit
RP10	012	Reporting And Inquiry	Project (optional)	Fit
RP11	000	Reporting And Inquiry	Allow for multiple or select all field selection for inquiry criteria.	Fit
RP12	001	Reporting And Inquiry	Provide ability to report on financial data in relation to non-financial statistical measures (performance measures) uploaded to the System or imported from Microsoft Office desktop applications, and measure actual variance.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
RP13	001	Reporting And Inquiry	Provide ability to maintain historical data for inquiry and reporting purposes for the current and four (4) preceding appropriation years with the ability to summarize data for the selected period and level within the data classification structure.	Fit
RP17	000	Reporting And Inquiry	Provide statement formatting capability within the base application software or utilize a third party publishing product for this purpose.	Fit
RP21	000	Reporting And Inquiry	include a comprehensive ad hoc reporting tool or report writer to allow end users to create ad hoc reports from data maintained in the System.	Fit
RP21	206	Reporting And Inquiry	Add "authorized" before end users.	Fit
RP22	001	Reporting And Inquiry	Report writer should allow for simultaneous access to multiple files and/or tables and Provide for:	Fit
RP22	002	Reporting And Inquiry	User-defined sorting, merging and summarization of records	Fit
RP22	003	Reporting And Inquiry	Ability to save queries for future use	Fit
RP22	004	Reporting And Inquiry	Ability to view results of a query online, as a printed report, or download report file.	Fit
RP23	000	Reporting And Inquiry	Report writer should Provide ability to perform calculations on existing numeric fields to reach intended results.	Fit
RP24	000	Reporting And Inquiry	Report writer should Provide ability to create reports and data extracts to be directly imported into documents created in third party word processing, spreadsheet, and database applications.	Fit
RP25	000	Reporting And Inquiry	Allow users to run queries without system degradation.	Fit
RP26	208	Reporting And Inquiry	All inquiries/searches are not to be case sensitive.	Fit
SE01	000	Security	Provide a common security function across all application modules.	Fit
SE02	000	Security	Provide shared security with a potential data warehouse (if necessary).	Fit
SE03	001	Security	Allow for establishment of multiple security coordinators:	Fit
SE03	002	Security	At agency-wide level (agency security administrator)	Fit
SE03	003	Security	At organization level	Fit
SE03	004	Security	At program level	Fit
SE03	200	Security	System should provide the ability to review data without risk to the production system for designated executives and managers.	Fit
SE03	215	Security	Establish security coordinator at functional "modular" level,	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
SE03	216	Training	Data segmentation by agency and agency unit. Create security and data segmentation for training data by adding set ID and business unit tables to the training table. These become new key fields associated with all courses, sessions, and training programs. These key fields are named course owner, training program owner, and session owner. (Note: If requirement ET 4 is accepted, another similar entity, bundle owner will be needed. All these equate to set ID and business unit of the entity "adding" the data (course, session, training program, and bundle.) Business Rule Definitions: Super users are application administrators who manage the business rules and data systems across an agency (set ID). End users manage training data at individual facility (business unit) levels. Super users add courses and training programs "owned" by agency (set ID). All values added at the agency level are shared across business units. End users may associate employees with agency-owned training programs. End users can create sessions from the agency-owned courses. The added session and courses are "owned" by the business unit. Super users cannot add sessions. End users may create courses, training programs, and bundles "owned" by their business unit. They may create sessions from courses they own and associate employees to training programs they own. End users cannot access courses, training programs, sessions, and bundles owned by business units other than their own. Super users may only view courses, training programs, sessions, an bundles owned by business units. Agency training programs will accept only courses owned by the agency. Training programs owned by a business unit will accept agency or locally-owne courses.	Gap
SE03	217	Security		Fit
SE03	218	Security	Allow security at multi-facility level	Fit
SE04	001	Security	Provide multi-level security controls to prevent unauthorized use of system and corruption of data, restrict access to the database, maintain database process controls, and log all database transactions. The support system must access restriction capability to:	Fit
SE04	002	Security	Application module (purchasing, accounting, personnel management)	Fit
SE04	003	Security	Screens and tables	Fit
SE04	004	Security	Data elements	Gap
SE04	005	Security	Functions (add, change delete, inquiry)	Fit
SE04	006	Security	Workflow electronic approvals	Fit
SE04	007	Security	Business event (invitation to bid, purchase order)	Fit
SE04	008	Security	Organizational unit	Fit
SE04	009	Security	Strategic program	Fit
SE05	000	Security	Provide the capability to restrict access by an individual user ID (or identified group of user IDs) and password. restrict access to self-service web applets b user ID or employee number and PIN.	Fit
SE06	000	Security	System security must support the establishment of passwords. Users should only have to log onto the System once to be allowed to access all application modules for which he/she is authorized to access. The user ID should define a password with a minimum length of five (5) alphanumeric characters. The password should be encrypted so that it is not viewed when entered.	Fit
SE06	227	Security	Is a password length of 5-Alphanumeric characters sufficient? Should at least one special character be required? Passwords should not be case sensitive, and variable length passwords should be allowed.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
SE07	000	Security	System security must Provide ability to establish a parameter-driven timeframe for which password will expire if not changed.	Fit
SE08	000	Security	System security must Provide for the prompting of password expiration at least five (5) days prior to actual expiration.	Gap
SE08	228	Security	Does the clock run for the 5-day expiration, though the system has not been accesed?	Gap
SE08	230	Security	Fifteen (15) days rather than five (5) to ensure adequate notification and allow for vacation leaves.	Gap
SE09	000	Security	System security should allow security coordinators to reset passwords without knowing the existing password.	Fit
SE10	000	Security	System security should Provide ability to establish a time-out limit. If a workstation of which a user has logged into the System is left unattended for the established time frame, the user's session will be terminated. This time-out requires the user to re-enter their password before continuing.	Fit
SE10	201	Security	Once the password is entered, the user should be returned to the same location	Fit
SE11	000	Security	System security should Provide the ability for security coordinator to log out users when necessary to perform maintenance or other activities that require users to leave the System. Such log-outs should Provide for an orderly shutdown of the client workstation.	Fit
SE12	000	Security	System security should Provide ability to disable log-on capabilities if unsuccessful password entry is attempted after a parameter-driven number of unsuccessful attempts, and Provide for automatic notification of security administrator.	Gap
SE13	000	Security	System security should Provide ability to limit log-on of user IDs to one workstation at a time. If such functionality is enforced and the user attempts to log onto a workstation while already logged on another, the system shoutl provide a message that the user ID is already in use.	Gap
SE13	202	Security	System security should provide unlimited log-on of user IDs to one workstation at a time. If such functionality is enforced and the user attempts to log onto a workstation while already logged on another, the System should provide a message that the user ID is already in use.	Gap
SE13	204	Security	The system should also identify the terminal and terminal location where the user ID is already in use.	Gap
SE14	000	Security	For those instances where a user justifiably requires access to more than one workstation simultaneously, the allow for the assignment of a second user ID.	Fit
SE15	000	Security	System menus should not display application module, function and screen options for which the user does not have access.	Fit
SE16	000	Security	Security must be Provided at the network, application, and database levels as well as at the client level.	Fit
SE17	000	Security	Provide ability to synchronize application security with network and Windows desktop security.	Gap
SE18	000	Security	Provide an audit trail of user access and unauthorized attempts to access, and should distinguish web browser activity from client workstation activity.	Gap
SE18	208	Security	The system must provide a report that identifies user access and unauthorized access attempts for monitoring/review by Security Officer, and to assist in preparation of monthly report on security breaches required by and furnished to DIR. The number of attempts, 1 through 99, should be a managed element of the security system.	Gap
SE19	000	Security	Provide ability to suspend all user access when a user ID is terminated; system should maintain security parameter settings in an inactive status in case said security were to be re-activated in the future.	Fit
SE19	210	Security	Parameters should be reset when an employee changes from one program area to another.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
SE19	211	Security	Will previous access be activated/reactivated or will a review of access rights take place?	Fit
SE20	000	Security	Provide the ability to enforce the changing of all passwords upon demand.	Gap
SE21	000	Security	Provide ability to establish standard user profiles from which individual user IDs may inherit privileges.	Fit
SE22	000	Security	Provide an edit to warn security coordinator of potential security changes based on personnel actions processed in the personnel management module (employee termination, employee transfer).	Fit
SE23	000	Security	System security should Provide ability for non-employees to access the System. In such instances, the not edit against the personnel management module for qualifying personnel actions that affect security.	Fit
SE24	000	Security	Provide ability to create a user ID with a fixed expiration date (for non-employees required to access the System).	Gap
SE25	000	Security	Provide online inquiry into the security table by authorized security coordinators. The security table should be encrypted and not allow for viewing of password information.	Fit
SE25	213	Security	In addition, transmission of passwords should b encrypted.	Gap
SE26	000	Security	Provide ability to secure document attachments as read only and control deletion or alteration.	Gap
SE27	000	Security	Provide ability to inquire and report on individual user IDs and user profiles.	Fit
SE28	001	Security	System security should Provide ability for security coordinators to inquire on the various views that a specific user has access to.	Fit
SE28	002	Security	NOTE: The security requirements are not intended to reflect that application level security must be coded into the application; the above security functionality may be managed through use of an industry standard security package.	Fit
SE29	214	Security	The system should require a new password on every password change and should not allow a user to reuse previous passwords.	Gap
SE31	220	Security	The login screen must inform users of the last date their password was used. Additionally, the last date each user's password was changed should be stored	Gap
SE32	221	Security	The system should provide the capability for security information to reside in a database separate from the application database.	Gap
SE33	222	Security	The system must require that the user change his password (1) at first login, (2) when reset by Administrator, and (3) when expired.	Fit
SE34	223	Security	The system must disallow a user to re-use a password within a one-year period	Gap
SE36	225	Security	The system must allow password to be changed from login screen and from within the application.	Gap
SE37	226	Security	The system must allow for independent region access to only their own regional data when running any kind of statistical reporting query, even thought all data needs to be housed in a centralized database.	Fit
TL	208	Time, Labor, & Leave A	An edit should be added to show the amount of leave used towards service credit months and fatal any attempt to enter requested or used leave that would reduce the leave balance under the "used" leave.	Gap
TL	210	Time, Labor, & Leave A	System should not allow for the accidental entry of FLSA overtime for employees whose position's FLSA flag indicates they are exempt.	Fit
TL	212	Time, Labor, & Leave A	Educational Leave. Eligible employees may be released from regular work assignments without loss of pay or benefits to attend courses at a vocational school, technical school, college or university.	Fit
TL	213	Time, Labor, & Leave A	System should track educational leave including employee stipend and professional trainee status.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL01	000	Time, Labor, & Leave A	Support distributed entry and edit of time and leave data, thereby allowing the programs to enter their own time reporting data.	Fit
TL01	222	Time, Labor, & Leave A	System should support distributed entry and edit of time and leave data, thereby allowing the programs to enter their own time reporting data on a restricted basis.	Fit
TL01	223	Time, Labor, & Leave A	System should allow for certification daily or weekly at a minimum.	Fit
TL02	000	Time, Labor, & Leave A	Allow for applying personnel costs to the proper account coding distributions based on prior history of time worked.	Modified Gap
TL03	001	Time, Labor, & Leave A	Provide for both exception and positive time reporting as follows:	Fit
TL03	002	Time, Labor, & Leave A	Exception reporting Timesheet entry is not required in order to pay an employee's regularly scheduled hours in the pay period. Only exceptions to a regular workweek are reported (FLSA overtime, usage of paid and unpaid leave compensatory time earned and used).	Fit
TL03	003	Time, Labor, & Leave A	Positive reporting Timesheet entry is required in order to pay an employee. Timesheet must account for all hours (regular, FLSA overtime, usage of paid and unpaid leave, compensatory time earned and used.)	Fit
TL03	224	Time, Labor, & Leave A	System should allow for a workweek schedule beginning at noon on Friday and ending at noon the following Friday that will be used by employees who are FLSA covered employees. Note: Beginning and ending at these times well negate the automatic overtime situations which would result in a workweek schedule of midnight Friday to midnight Friday..	Gap
TL04	000	Time, Labor, & Leave A	Allow user agencies to designate each position for exception or positive time reporting.	Gap
TL04	226	Time, Labor, & Leave A	Need ability to designate exception or positive reporting based on FLSA exempt or non-exempt.	Gap
TL08	001	Time, Labor, & Leave A	Employee electronic timesheets must capture the following information:	Gap
TL08	002	Time, Labor, & Leave A	Employee number (Social Security Number)	Modified Gap
TL08	003	Time, Labor, & Leave A	Employee name	Fit
TL08	004	Time, Labor, & Leave A	Position number	Modified Gap
TL08	005	Time, Labor, & Leave A	Normal workweek	Modified Gap
TL08	006	Time, Labor, & Leave A	Shift hours	Modified Gap
TL08	007	Time, Labor, & Leave A	Employee electronic timesheets must capture the following information: Timekeeper	Gap
TL08	008	Time, Labor, & Leave A	Supervisor	Modified Gap
TL08	009	Time, Labor, & Leave A	Day	Fit
TL08	010	Time, Labor, & Leave A	Date	Fit
TL08	011	Time, Labor, & Leave A	Earnings type (leave types and pay types)	Modified Gap
TL08	012	Time, Labor, & Leave A	Number of hours worked per day	Fit
TL08	013	Time, Labor, & Leave A	Leave hours used	Fit
TL08	014	Time, Labor, & Leave A	Multiple combinations of account coding distribution(s) for any element or level of the data classification structure:	Fit
TL08	015	Time, Labor, & Leave A	Organization	Fit
TL08	016	Time, Labor, & Leave A	Strategic Program	Fit
TL08	017	Time, Labor, & Leave A	Appropriation Year	Modified Gap
TL08	018	Time, Labor, & Leave A	Method of Finance	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL08	019	Time, Labor, & Leave A	PCA (USAS Required)	Fit
TL08	020	Time, Labor, & Leave A	Contract (optional)	Modified Gap
TL08	021	Time, Labor, & Leave A	Appropriation Number	Fit
TL08	022	Time, Labor, & Leave A	Fund	Fit
TL08	023	Time, Labor, & Leave A	Grant (optional)	Fit
TL08	024	Time, Labor, & Leave A	Project (optional)	Fit
TL08	025	Time, Labor, & Leave A	Leave balances (sick leave, annual leave, FLSA overtime leave, compensatory leave)	Modified Gap
TL08	026	Time, Labor, & Leave A	Pay period	Modified Gap
TL08	027	Time, Labor, & Leave A	Pay period ending date	Modified Gap
TL08	028	Time, Labor, & Leave A	Total hours worked by date	Gap
TL08	029	Time, Labor, & Leave A	Total hours worked by week	Modified Gap
TL08	030	Time, Labor, & Leave A	Total hours worked by pay period	Modified Gap
TL08	214	Time, Labor, & Leave A	Add to this requirement to include:	Modified Gap
TL08	215	Time, Labor, & Leave A	Vacation Eligible	Modified Gap
TL08	216	Time, Labor, & Leave A	FLSA Status (exempt/non-exempt	Modified Gap
TL08	217	Time, Labor, & Leave A	Longevity date	Modified Gap
TL08	218	Time, Labor, & Leave A	FMLA Leave	Modified Gap
TL08	219	Time, Labor, & Leave A	Parental Leave	Modified Gap
TL08	220	Time, Labor, & Leave A	Special Leave (administrative leave)	Fit
TL08	221	Time, Labor, & Leave A	Military Leave	Fit
TL09	001	Time, Labor, & Leave A	Allow for the capture of employee timesheet information as follows:	Fit
TL09	002	Time, Labor, & Leave A	Employees enter timesheet information directly into electronic timesheet through industry-standard web browser.	Fit
TL09	003	Time, Labor, & Leave A	Employees complete hard-copy timesheets, which are then entered in the System by program timekeepers distributed throughout the agency.	Fit
TL09	004	Time, Labor, & Leave A	Employees use of magnetic swipe timecards for recording time in and time out (hospitals).	Fit
TL10	000	Time, Labor, & Leave A	Provide ability for employees to charge their time worked to an unlimited number of account coding distributions.	Fit
TL100	237	Time, Labor, & Leave A	TL100-237: The system will automatically generate the Overtime Payroll Authorization for any employee whose overtime leave exceeds 240 hours. It wi allow the supervisor to review the Overtime Payroll Authorization, modify it, approve it, and route it to the HRS representative. PA91-383: The system shall provide the capability to detect that payment is due and to pay overtime to an employee under the following circumstances: PA91-384: The employee Separates from the agency; PA91-385: The employee moves from an FLSA-covered job to a non-FLSA covered job; PA91-386: The agency decides to pay all employees (or selected groups of employees) for their overtime; PA91-387: The employee exceeds 240 hours of overtime (in which case the agency must pay only for those number of hours exceeding 240).	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL102	239	Time, Labor, & Leave A	The system will provide ability for exempt employees to record work beyond assigned hours and route this to the supervisor for approval.	Fit
TL103	240	Time, Labor, & Leave A	The system will provide the supervisor with a report of work beyond assigned hours, which has been approved/and or entered but not approved.	Fit
TL104	241	Time, Labor, & Leave A	The system will evaluate all Leave Correction/Separation Report data that change previous time and/or leave data (or balances). It will generate warnings if any changes will cause any time & leave business rule to be violated.	Fit
TL105	242	Time, Labor, & Leave A	The system will archive detail data for Military Leave.	Fit
TL11	001	Time, Labor, & Leave A	Provide all necessary edits to ensure accurate timesheet entry, including:	Fit
TL11	002	Time, Labor, & Leave A	Perform all standard edits (ensure numeric field entries are numeric, validate pay period dates, and ensure no duplicate timesheets entered).	Fit
TL11	003	Time, Labor, & Leave A	Validate employee via position number and employee number.	Gap
TL11	004	Time, Labor, & Leave A	Edit for holiday hours worked and generate a warning message if such hours are reported on a day other than a holiday.	Fit
TL11	005	Time, Labor, & Leave A	Identify State-mandated substitute holidays and Provide an edit to ensure that said holidays are taken only on "substitutable" days.	Fit
TL11	006	Time, Labor, & Leave A	Validate account coding distributions (grant, project) entered on timesheets against data classification elements established in General Accounting module.	Modified Gap
TL11	007	Time, Labor, & Leave A	Validate account coding distributions entered on timesheets against employee/coding element relationship table to ensure that timesheet information is accepted only for those coding element combinations that the employee is authorized to use (employee cannot charge time to grant for which he/she is not authorized to do so).	Modified Gap
TL11	008	Time, Labor, & Leave A	Perform "reasonableness" edits on dates and hours, and generate appropriate warning messages for unreasonable conditions.	Fit
TL11	245	Time, Labor, & Leave A	Because of privacy issues, some number other than the SSN should be used as an identifier.	Fit
TL12	001	Time, Labor, & Leave A	Provide edit to ensure that:	Fit
TL12	002	Time, Labor, & Leave A	(1) Leave can only be used to the extent of accrued leave balances. (2)If an employee reports paid leave hours used, but his/her leave balances indicate insufficient hours, the system must automatically convert the leave used to another authorized paid leave type or to leave without pay (based on established conversion sequence) with a (3)warning message that leave will be converted.	Gap
TL12	003	Time, Labor, & Leave A	Leave used may not exceed total workweek.	Fit
TL13	005	Time, Labor, & Leave A	System must provide for both exception and positive time reporting as follows: (1) be capable of ensuring that all timesheet entry is completed and (2) all required approvals have been received before payroll calculations are performed, and (3) should ensure that no changes are made to a month's timesheets once said month has been closed for time reporting purposes. (4) Required changes after month-end time closing will be completed through documented adjustments.	Gap
TL15	001	Time, Labor, & Leave A	Provide for the capture of all employee hours worked and leave used by entry of hours associated with each earnings/leave type:	Fit
TL15	002	Time, Labor, & Leave A	Hours worked by each unique account coding distribution:	Fit
TL16	000	Time, Labor, & Leave A	Allow for entry of time and attendance data using hours and minutes and am/pm designation, and should allow for rounding.	Fit
TL16	259	Time, Labor, & Leave A	System should allow rounding attendance data to the quarter hour.	Fit
TL17	000	Time, Labor, & Leave A	Provide ability to optionally default current month's timesheet from prior month's recorded time entries.	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL18	000	Time, Labor, & Leave A	Provide ability to record electronic signatures for employee and supervisor as part of workflow management process.	Gap
TL18	260	Time, Labor, & Leave A	Should include electronic routing/certification to appropriate signature authorities	Modified Gap
TL19	000	Time, Labor, & Leave A	Provide ability to compare time information recorded in the System to time information recorded in the agency's morning report.	Gap
TL20	000	Time, Labor, & Leave A	Provide ability to designate a day or part of a day as declared time off (Good Friday) and appropriately account for said time.	Fit
TL21	000	Time, Labor, & Leave A	Provide a pop-up wizard to guide an employee in properly entering a specific time event (instructions for entering Good Friday time off).	Gap
TL22	000	Time, Labor, & Leave A	Allow for the capture and unique identification of Shift Differential time worked.	Fit
TL23	000	Time, Labor, & Leave A	support multiple shift differential rates with different effective dates within a pay period.	Fit
TL25	000	Time, Labor, & Leave A	Provide three (3) years of online employee leave and time reporting history.	Fit
TL26	001	Time, Labor, & Leave A	NOTE: The remainder of TL26 documents current State and TDH leave policies. These policies are subject to change and be flexible to support necessary changes.	Fit
TL26	266	Time, Labor, & Leave A	System should reflect TDHS leave policies.	Gap
TL26	267	Time, Labor, & Leave A	The system needs to "flag" employees who are on leave at the beginning of a month and show the accrued leave as not being available to use until the employee returns to work.	Modified Gap
TL26	271	Time, Labor, & Leave A	The system should "know" which days are state and national holidays.	Fit
TL26	272	Time, Labor, & Leave A	Extended Sick Leave, second block - The system should allow for the establishment of varying levels of eligibility for extended sick leave hours for employees based on agency defined criteria (e.g., length of service equates to different levels of extended sick leave eligibility, etc.)	Gap
TL26	273	Personnel Management	The system should not allow a leave of absence of more than 12 months without special override authority.	Fit
TL26	274	Base Benefits	The statement that FML is unpaid leave should be modified to show that FML, while unpaid by law, is used in conjunction with paid sick and vacation/annual leave until such leave is exhausted and after such time the remaining FML would be solely unpaid leave. An edit should be put into the system to ensure these leave types are used prior to unpaid leave being used. With the ability to override the edit in the case of FML being used for the purpose of birth of a child, adoption or placement of a child for foster care where the child or mother of the child is not under the care of a physician for illness or injury.	Fit
TL26	275	Time, Labor, & Leave A	An edit should be put into the system to ensure sick and vacation/annual leave types are used prior to unpaid leave being used. With the ability to override the edit in the case of parental being used for the purpose of birth of a child, adoption or placement of a child for foster care where the child or mother of the child is not under the care of a physician for illness or injury.	Gap
TL26	276	Time, Labor, & Leave A	Any leave for a court appearance must be as a witness for a job related reason There should be an edit in the system to "ask" whether or not the subpoena is for a job-related reason.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL26.1	001	Time, Labor, & Leave A	Annual Leave - Full-time employees begin earning Annual Leave immediately upon employment. accrue Annual Leave at the accrual rate appropriate for their level of State service and edit for proper fiscal year carryover amounts.

TL26/267 The system needs to "flag" employees who are on leave at the beginning of a month and show the accrued leave as not being available to use until the employee returns to work.

TL26.1/002 Part-time employees earn a prorated amount of Annual Leave and their maximum carryover is also prorated.

TL26.1/004 An employee cannot use his/her Annual Leave until he/she has completed 6 months of continuous employment with the State.

TL26.1/005 When posting Annual Leave used on the first working day of the month, verify that the previous month had a balance greater than or equal to the number of Annual Leave hours being requested.

TL26.1/200 Part-time employees earn a prorated amount of Sick Leave and their maximum carryover is also prorated.

TL26.2/001 Sick Leave - Employees begin earning Sick Leave immediately upon employment. accrue Sick Leave at the accrual rate of 8 hours per month for full-time employees. Part-time employees earn a prorated amount of Sick Leave.

TL26.2/008 When posting Sick Leave used on the first working day of the month, System should verify that the previous month had a balance greater than or equal to the number of Sick Leave hours being requested.

TL27/000 Provide ability to suspend the accrual of both Annual and Sick Leave based on the existence of certain conditions (employee on leave without pay). In such instances, the employee will not be credited with accrued leave earned until he/she works their first day of the next month.

TL31/335 Terminating employees may remain on payroll after last day worked, but not entitled to accrue or use sick leave.

TL41/000 Provide optional ability to flag employees for which leave is not to be accrued (employees on Leave Without Pay).

TL88/404 The system should maintain the formula shown below for calculating balances for annual leave, sick leave, over time leave. Other types of leave will be tracked when they are used.

TL88/405 Beginning Leave Balance
TL88/406 + Earned/Accrued Leave
TL88/407 + Leave Transferred In
TL88/408 - Leave Used
TL88/409 - Leave Transferred Out
TL88/410 - Leave Paid
TL88/411 - Leave Lost/Converted
TL88/412 +/- Leave Corrections
TL88/413 Equals Ending Leave Balance

PM07/449 Leave accruals are based on length of state service at the first of the month. This implies that whatever option is chosen for leave accruals, the accruals have to be updated as of the first of the month or a method has to be available to determine state service as of the first of the month. | Gap |
TL26.1	002	Time, Labor, & Leave A	Part-time employees earn a prorated amount of Annual Leave and their maximum carryover is also prorated.	Modified Gap
TL26.1	004	Time, Labor, & Leave A	An employee cannot use his/her Annual Leave until he/she has completed 6 months of continuous employment with the State.	Modified Gap
TL26.1	005	Time, Labor, & Leave A	When posting Annual Leave used on the first working day of the month, verify that the previous month had a balance greater than or equal to the number of Annual Leave hours being requested.	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL26.1	200	Time, Labor, & Leave A	Part-time employees earn a prorated amount of Sick Leave and their maximum carryover is also prorated.	Modified Gap
TL26.10	001	Base Benefits	Family Leave is unpaid time off from work. Family Leave may be taken if employee has at least 12 months of total State service and at least 1250 hours of service in the previous 12-month period.	Fit
TL26.10	283	Base Benefits	May be paid or unpaid leave. Has limit (12 weeks) to be enforced.	Fit
TL26.11	001	Base Benefits	A State employee that is not eligible to take leave under the FMLA may take Parental Leave. The employee may take up to 12 weeks of leave without pay for parental purposes following the date of birth of a child or the adoption or foster care placement of a child under 3 years of age.	Fit
TL26.12	001	Time, Labor, & Leave A	A State employee who is a foster parent to a child under the conservatorship of the Department of Protective and Regulatory Services is entitled to leave of absence with full pay for the purpose of attending DPRS' or school district meetings regarding the child.	Fit
TL26.13	001	Time, Labor, & Leave A	Any State employee who is a certified disaster service volunteer of the Red Cross or who is training to become such a volunteer may be granted leave with pay for up to 10 days per fiscal year to participate in specialized disaster relief services for the American Red Cross.	Fit
TL26.14	001	Time, Labor, & Leave A	Any State employee who is a reserve member of the armed forces or the National Guard may be granted leave with pay for up to 15 days per federal fiscal year to serve under orders.	Fit
TL26.15	001	Time, Labor, & Leave A	Any State employee who is a volunteer fireperson may be granted leave with pay for up to 5 days per fiscal year to attend related training schools conducted by state agencies. He/she will also receive leave with pay for the purpose of responding to emergency fire situations.	Fit
TL26.16	001	Time, Labor, & Leave A	Any State employee subpoenaed or required to appear in court or at an administrative hearing during regular work hours will receive leave with pay.	Fit
TL26.17	001	Time, Labor, & Leave A	Any State employee called for jury service will receive leave with pay and will not be required to account for any fees received for jury service.	Fit
TL26.18	001	Time, Labor, & Leave A	A blind employee is entitled to leave with pay for up to 10 days per fiscal year to attend a training program to acquaint the employee with an assistance dog to be used by the employee.	Fit
TL26.2	001	Time, Labor, & Leave A	Sick Leave - Employees begin earning Sick Leave immediately upon employment. accrue Sick Leave at the accrual rate of 8 hours per month for full-time employees. Part-time employees earn a prorated amount of Sick Leave.	Modified Gap
TL26.2	002	Time, Labor, & Leave A	There is no waiting period before an employee is eligible to use Sick Leave.	Fit
TL26.2	003	Time, Labor, & Leave A	Leave Balances are rolled over in PeopleSoft at the end of a calendar year. State of Texas rolls leave balances at the end of a fiscal year. Annual Leave hours in excess of the maximum allowable carryover left at the end of a fiscal year will be credited to the employee's Sick Leave balance as of the first day of the next fiscal year. There is not limit to the amount of Sick Leave an employee may accrue.	Gap
TL26.2	004	Time, Labor, & Leave A	An employee that does not use Sick Leave and Leave Without Pay for 6 consecutive full calendar months is awarded 8 hours of Emergency Leave to use as a Sick Leave Bonus Day. Once awarded, the employee must use the Bonus Day within six months or it will be forfeited. System must track Sick Leave Bonus Day award date, expiration date (6 months from award date), and use date, and date next eligible, and provide an edit to ensure that the 6 month period is not exceeded.	Fit
TL26.2	005	Time, Labor, & Leave A	An employee may use up to 8 hours of Sick Leave each calendar year to attend Parent-Teacher Conferences for his/her children. System must provide edit to ensure that use of Sick Leave for this purpose does not affect an employee's eligibility to earn a Sick Leave Bonus Day.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL26.2	007	Time, Labor, & Leave A	System should provide ability to restore an employee's Sick Leave balance if the employee separates from the state employment due to a formal reduction in force but obtains re-employment with the State within 12 months of the termination date.	Fit
TL26.2	008	Time, Labor, & Leave A	When posting Sick Leave used on the first working day of the month, System should verify that the previous month had a balance greater than or equal to the number of Sick Leave hours being requested.	Modified Gap
TL26.2	287	Time, Labor, & Leave A	An employee that does not use Sick Leave (delete and Leave Without Pay) for 6 consecutive full calendar months is awarded 8 hours of Emergency Leave to use as a Sick Leave Bonus Day.	Gap
TL26.2	288	Time, Labor, & Leave A	An employee may convert unused Sick Leave and Annual Leave into retirement service in order to qualify for retirement at the rate of one month of service credit for each 160 hours of accumulated Sick Leave and one month for each fraction of days or hours remaining after division of the total hours of accumulated Sick Leave by 160.	Gap
TL26.2	289	Time, Labor, & Leave A	Include: When Legislative transfers occur, all balances are transferred; with interagency transfers only vacation and sick balances transfer.	Fit
TL26.2	291	Time, Labor, & Leave A	Include all reasons that an employee's sick leave may be restored not just for reductions in force.	Fit
TL26.3	001	Time, Labor, & Leave A	Extended Sick Leave - Employees that will or have exhausted all leave accruals and will require additional time for recovery may be awarded Extended Sick Leave.	Fit
TL26.3	002	Time, Labor, & Leave A	Edit to ensure that employee has a minimum of two years continuous State service.	Modified Gap
TL26.3	003	Time, Labor, & Leave A	Edit to ensure that employee has exhausted all appropriate paid leave.	Modified Gap
TL26.3	004	Time, Labor, & Leave A	System must maintain and edit for maximum amounts of Extended Sick Leave. Separate maximum amounts must be maintained for leave "Related to an On-the-Job Injury/Illness" or leave "Not Related to an On-the-Job Injury/Illness".	Fit
TL26.3	299	Time, Labor, & Leave A	The edit should include other eligibility criteria.	Modified Gap
TL26.4	001	Time, Labor, & Leave A	Holiday Leave - Employees that work designated State holidays accrue holiday leave. The System should automatically identify holiday leave worked (if employee charges hours worked on timesheet to a holiday) and appropriately accrue said leave for employee based on employee status (employee on duty or paid leave status, leave of absence. System should provide leave accounting for optional holidays (e.g., Rosh Hashanah) that are taken in lieu of other designated holidays.	Fit
TL26.4	002	Time, Labor, & Leave A	Holiday hours should be removed when an employee is on Leave without Pay the day before and the day after a holiday.	Fit
TL26.4	301	Time, Labor, & Leave A	Substitution for an Optional Holiday must be completed within the same fiscal year. (Refer to Holiday Table).	Gap
TL26.4	302	Time, Labor, & Leave A	System should provide that when an employee is suspended for client abuse, neglect or exploitation the employee is not compensated for the holiday, even if the employee is on paid leave status immediately before and after the holiday.	Gap
TL26.5	001	Time, Labor, & Leave A	Compensatory and FLSA Overtime - System must calculate and track Fair Labor Standards Act (FLSA) overtime for FLSA-covered employees separately from compensatory time (for non-FLSA covered employees).	Fit
TL26.5	002	Time, Labor, & Leave A	System must provide ability to designate positions as exempt or non-exempt under the FLSA (FLSA status indicator).	Fit
TL26.5	003	Time, Labor, & Leave A	System must track date earned for both FLSA Overtime and Compensatory Time.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL26.5	004	Payroll Administration	FLSA Overtime: A non-exempt employee that works more than 40 hours in one week: accumulates FLSA overtime at 1 ½ rate. The employee must be paid for any accumulated hours in excess of 240 (160 hours worked). Upon termination, the employee must be paid for any unused FLSA overtime. For banked overtime, payroll calculation needs to consider state-mandated rules for calculating overtime rate.	Gap
TL26.5	005	Time, Labor, & Leave A	In addition to maintaining balances, the System must maintain year-to-date accumulators for FLSA overtime earned, used, and paid.	Fit
TL26.5	006	Time, Labor, & Leave A	Compensatory Time: - FLSA non-covered employees are not eligible to receive time and one-half compensation for excess time worked but some are eligible for compensation as follows:	Fit
TL26.5	007	Time, Labor, & Leave A	Compensatory time must be taken during the 12 month period following the end of the workweek in which it was earned or it will be lost.	Fit
TL26.5	008	Time, Labor, & Leave A	In addition to maintaining balances, the System must maintain year-to-date accumulators for compensatory time earned, and compensatory time used.	Gap
TL26.5	009	Time, Labor, & Leave A	Payment for compensatory time is made only if the employee works at the State Chest Hospital or is doing work directly related to immunizations.	Fit
TL26.5	316	Personnel Management	System should provide for changing from non-exempt to exempt.	Fit
TL26.5	320	Time, Labor, & Leave A	Compensatory time needs flexiblity for discretionary hours subject to supervisory approval.	Fit
TL26.6	001	Time, Labor, & Leave A	Emergency Leave - Emergency LeaveEmergency Leave is authorized leave with pay to be used for: Family Death, Sick Leave Bonus Day, Military Service, Employee Incentive Program, Voluntary Emergency Services in the Community, Natural Disaster, Movement of Household, Termination Processing, Personal Safety, Witness Duty	Fit
TL26.6	326	Time, Labor, & Leave A	Add the following reasons: investigations and on-call duty.	Fit
TL26.6	327	Time, Labor, & Leave A	Emergency Leave is also authorized for the following:	Fit
TL26.6	328	Time, Labor, & Leave A	To remove an employee from the facility premises during an investigation of an incident that could result in dismissal or during an investigation to determine the ability to perform the duties of the position.	Fit
TL26.6	329	Time, Labor, & Leave A	To provide one day of decision-making leave through the Positive Performance Program.	Fit
TL26.7	001	Time, Labor, & Leave A	Leave Without Pay is typically used to allow an employee to take leave without pay for a period of less than one calendar month or an employee has insufficient leave balances to cover his/her absence.	Fit
TL26.8	001	Time, Labor, & Leave A	Any employee may be granted a leave of absence without pay for a period of one calendar month or more.	Fit
TL26.8	331	Time, Labor, & Leave A	Any employee may be granted a leave of absence without pay for a period of one calendar month or more. Must edit that all appropriate leave balances are zero.	Gap
TL26.9	001	Time, Labor, & Leave A	Under certain circumstances, employees may be granted administrative leave with pay (reward for outstanding performance as documented in an employee's Performance Journal).	Fit
TL26.9	002	Time, Labor, & Leave A	Total amount of administrative leave that may be awarded to an employee cannot exceed 32 hours in the fiscal year.	Gap
TL27	000	Time, Labor, & Leave A	Provide ability to suspend the accrual of both Annual and Sick Leave based on the existence of certain conditions (employee on leave without pay). In such instances, the employee will not be credited with accrued leave earned until he/she works their first day of the next month.	Modified Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL28	000	Time, Labor, & Leave A	Provide ability to establish and maintain a Sick Leave Pool whereby employees can voluntarily donate a specific amount of their Sick Leave to the pool each fiscal year. In the event of catastrophic illness, an employee may then be awarded Sick Leave from the pool. Provide ability to record and maintain an audit trail of all transactions associated with the pool and maintain pool balances.	Gap
TL30	000	Time, Labor, & Leave A	Provide ability to make corrections to employee leave balances or to enter initial leave balances for new employees not already existing in the system.	Fit
TL30	334	Time, Labor, & Leave A	The system should provide the option of "canceling" an entry. This option exists in USPS. Deleting erases the entry entirely, while canceling the entry leaves an audit trail.	Fit
TL31	000	Payroll Administration	(1) Provide ability to allow terminating employees to run out their leave balances, to (2) receive a lump sum payment for their remaining leave 30 days after termination, or to (3) transfer leave balances to another State agency.	Gap
TL31	335	Time, Labor, & Leave A	Terminating employees may remain on payroll after last day worked, but not entitled to accrue or use sick leave.	Modified Gap
TL33	000	Time, Labor, & Leave A	Provide self-service applet to allow employees to review their leave balances (including leave subject to lapse) and request time off through the use of an industry-standard web browser.	Gap
TL34	000	Time, Labor, & Leave A	Generate advance notices to employees concerning potential loss/conversion of leave and route to employees and supervisors.	Fit
TL35	000	Time, Labor, & Leave A	Integrated with the General Accounting module to provide hours charged to various projects, grants, programs, organizations, and funds for labor distribution purposes. associate leave used to the account coding distribution actually accrued, and charge accordingly.	Modified Gap
TL36	000	Time, Labor, & Leave A	Provide for user-defined levels of electronic approval for timesheet authorization	Gap
TL36	336	Time, Labor, & Leave A	Add: The system will support an electronic approval/certification for all time and leave submittals. Before any time and leave data is posted to the employee's master time and leave record the sytem will insure the supervisor and when applicable and the HRS representative and/or another adminstrative staff have approved the submittal.	Modified Gap
TL37	000	Time, Labor, & Leave A	Provide security to restrict access to time reporting function to authorized users only (employee, supervisor, timekeeper).	Fit
TL38	000	Time, Labor, & Leave A	Provide for search by employee name (partial or full name), employee number (SSN), or position to locate individual timesheets for current or prior periods.	Fit
TL40	000	Time, Labor, & Leave A	Maintain an audit trail of all earnings type (pay types and leave types) codes, indicating effective start and stop dates.	Fit
TL41	000	Time, Labor, & Leave A	Provide optional ability to flag employees for which leave is not to be accrued (employees on Leave Without Pay).	Modified Gap
TL42	000	Time, Labor, & Leave A	Be flexible and expandable regarding pay types. The flexibility/expandability must be user maintainable.	Fit
TL42	343	Time, Labor, & Leave A	Include a "flag" for employees who are running out their leave and remaining on the payroll following a resignation submission.	Gap
TL43	000	Time, Labor, & Leave A	Maintain leave information at the employee level not the position level. Leave balances transfer with an employee when the employee changes positions or organization. FLSA overtime balances of transferring employees are paid unless the new program chooses to accept the liability.	Fit
TL43	344	Time, Labor, & Leave A	The payment of overtime balances should be optional. An edit should prompt Human Resources to determine if the transferring employee should be paid any existing overtime leave balances based on agency defined criteria.	Modified Gap
TL44	000	Time, Labor, & Leave A	Provide ability to automatically clear leave usage accumulators at fiscal year-end.	Modified Gap

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TL46	345	Time, Labor, & Leave A	System should provide ability to report on employee leave patterns (always use Sick Leave on Friday or Monday), but does not require agency to enter leave by day versus summarized.	Fit
TL48	347	Time, Labor, & Leave A	The system will be accessible through the Intranet but not through the Internet.	Gap
TL52	356	Personnel Management	The system will differentiate between a person and a position when establishing the supervisor/employee relationships. It will support the ability to transfer a supervisor to a new position without transferring all of the employees as well.	Fit
TL53	357	Personnel Management	The system will provide a list (or report) of all employees not assigned to one of these supervisor/employee relationships.	Fit
TL54	358	Personnel Management	The system will support supervisor/employee relationships. The system will allow supervisors to designate someone (themselves or one of their staff) to maintain their relationships.	Fit
TL57	361	Personnel Management	The system will provide a means to transfer records from one supervisor to another or, when appropriate, to HR and will use an effective date to effect the transfer. This will be able to be done for a single employee, several selected employees, or an entire supervisory unit.	Fit
TL58	362	Time, Labor, & Leave A	The system will allow the supervisor to access employees' time & leave records by a list defined by the supervisor/employee relationships. The system will allow a supervisor to access all levels of subordinates down to the lowest level on the relationship tree connected to beneath their position. The time & leave records will also be accessible by other record keys such as Employee Number, etc.	Fit
TL59	363	Security	The system will allow HRS staff to perform all supervisory and/or employee functions for all staff employed in their region or for state office staff housed in their regions. For these purposes, state office is considered a region. The system will keep an audit trail of the functions performed during these accesses. The system will require that comments be entered with each transaction of this type explaining the necessity for this intervention.	Fit
TL61	365	Security	The system will allow regional HR support staff to access all functions in the system, for all types of employees in their region or for state office staff housed in their regions. The system will keep an audit trail of the functions performed during these accesses. The system will require that comments be entered with each transaction of this type explaining the necessity for this intervention.	Gap
TL62	366	Security	The system will allow state office HR support staff to access all functions in the system, for all types of employees in every region. The system will keep an audit trail of the functions performed during these accesses. The system will require that comments be entered with each transaction of this type explaining the necessity for this intervention.	Gap
TL64	368	Time, Labor, & Leave A	The system will provide for a full audit trail of all time & leave detail posted to the employee master time & leave records.	Fit
TL65	369	Time, Labor, & Leave A	The system will support an off-line archival/purge process for the time and leave detail as well as any additional audit trails that are maintained.	Gap
TL66	370	Time, Labor, & Leave A	The system will generate an on-demand report of the audit trail data.	Fit
TL67	371	Time, Labor, & Leave A	The system will limit employees' access to their own time & leave data. Employees will be able to enter, electronically certify, route to supervisor for approval, change, and/or delete data that has not been posted1 to their master time & leave record. Employees will be able to enter, electronically certify, route to supervisor for approval, a Leave Change Request for changing or reversing a leave request which has already been posted1 to their master time & leave record. Employees will be able to review and print the detail for the current fiscal year (all or a portion) and the summary for the preceding fiscal year.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL68	372	Time, Labor, & Leave A	The system will give the supervisor the capability to access any of their employees' time & leave data. They shall be able to enter, electronically certify (approve or disapprove), route for posting1 to the master time & leave record, route to the employee, route to HRS for approval, change, and/or delete data which has not been posted1 to the master time & leave record. They will be able to enter, electronically approve, and route to HRS a Leave Change Request for changing or reversing a leave request which has already been posted1 to the master time & leave record. They will also be able to review and print the employee's time & leave detail for the current fiscal year and the summary for the preceding fiscal year. The system will require that comments be entered with each transaction of this type explaining the necessity for this intervention.	Fit
TL69	373	Time, Labor, & Leave A	The system will allow the HRS staff to enter a Leave Change Request to adjust any time or leave detail entry and/or balance for any fiscal year. The system will maintain an audit trail of these entries. The system will require that comments be entered with each transaction of this type explaining the necessity for this intervention.	Fit
TL72	380	Time, Labor, & Leave A	The system will not allow the creation of a Workweek Template that results in either overtime leave or compensatory leave.	Gap
TL73	381	Time, Labor, & Leave A	Supervisors and/or their designees will have the ability to designate the standard work schedule that applies to an employee by assigning (or reassigning) one of the Workweek Templates to that employee.	Fit
TL74	382	Time, Labor, & Leave A	When a supervisor is assigning or reassigning an employee's Workweek Template, the system will warn the supervisor if the (re)assignment will result in the employee working (or having worked) either more than 40 hours or less than 40 hours in the workweek. For part time employees, the system will use the employee's part time basis (percentage of full time hours) in determining the need for this warning.	Gap
TL75	383	Time, Labor, & Leave A	The assignment of a Workweek Template to an employee will include an effective date that may be in the future or in the past. On the effective date, this work schedule will become the standard workweek for that employee. When a past effective date is used the system will: examine all affected leave submittals and ensure that they comply with all business rules; and warn the supervisor if the new template will impact any leave balances.	Gap
TL76	384	Time, Labor, & Leave A	The system will provide a list (or report) of employees not assigned to a Workweek Template.	Fit
TL78	386	Time, Labor, & Leave A	The system will enforce all of the rules pertaining to time & leave through a combination of on-line edits, appropriate routing of submittals and/or e-mail notifications.	Gap
TL79	387	Time, Labor, & Leave A	The system will support the functionality of all of the time and leave forms including printed reports where necessary. These include the following:	Fit
TL79	388	Time, Labor, & Leave A	1. DHS Weekly Time Report	Fit
TL79	389	Time, Labor, & Leave A	2. Overtime Payroll Authorization	Fit
TL79	390	Time, Labor, & Leave A	3. Unit Leave Report	Fit
TL79	391	Time, Labor, & Leave A	4. Leave Correction/Separation Report	Fit
TL79	392	Time, Labor, & Leave A	5. Leave Record for Fiscal Year	Fit
TL79	393	Time, Labor, & Leave A	6. Request and Authorization for Leave	Fit
TL79	394	Time, Labor, & Leave A	7. Record of Work Beyond Assigned Hours	Fit
TL80	396	Time, Labor, & Leave A	The system will support a user maintained Leave Table of valid types of leave. Only authorized HR staff will have the ability to maintain this table. The system will use this table in all instances. Each table entry will have an Effective Date and an End Date. These dates will govern the dates when the corresponding leave type is valid. Entries in this table may not be deleted if as long as any detail exists anywhere in the Time & Leave System that depends on the table entry for validation.	Fit

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TL81	397	Time, Labor, & Leave A	The system will support leave encumbrances for each employee, for appropriate categories of leave. Employees will be able to encumber annual and sick against future accruals. An employee's request for future leave will increase the encumbrance for the type of leave requested for the corresponding month and year. The leave will be unencumbered once the leave is actually taken (i.e. the Request and Authorization for Leave is posted1 to the employee's time & leave master record). The supervisor (or designee) will have the ability to encumber the leave for an employee when the employee calls in requesting leave or leaves work unexpectedly. The system will generate a tickler (or reminder) for both the supervisor and the employee to remind them that a leave submittal is needed. The system will issue a warning if there is, (or in the case of future encumbrances, will be) an insufficient leave balance to cover the encumbrance (i.e. current leave balance + expected accrued leave - encumbrances < 0).	Gap
TL84	400	Time, Labor, & Leave A	The system will support the fiscal year beginning September 1 and ending August 31.	Modified Gap
TL87	403	Time, Labor, & Leave A	The system will support storage of scanned and/or faxed document images. Anytime a work rule requires a secondary document (such as a physician's statement) to support a request, the supporting document(s) will be scanned (or faxed) and stored electronically in the employee's time & leave file. The scanned document must be associated with one or more specific leave episodes.	Gap
TL88	404	Time, Labor, & Leave A	The system should maintain the formula shown below for calculating balances for annual leave, sick leave, over time leave. Other types of leave will be tracked when they are used.	Modified Gap
TL88	405	Time, Labor, & Leave A	Beginning Leave Balance	Modified Gap
TL88	406	Time, Labor, & Leave A	+ Earned/Accrued Leave	Modified Gap
TL88	407	Time, Labor, & Leave A	+ Leave Transferred In	Modified Gap
TL88	408	Time, Labor, & Leave A	- Leave Used	Modified Gap
TL88	409	Time, Labor, & Leave A	- Leave Transferred Out	Modified Gap
TL88	410	Time, Labor, & Leave A	- Leave Paid	Modified Gap
TL88	411	Time, Labor, & Leave A	- Leave Lost/Converted	Modified Gap
TL88	412	Time, Labor, & Leave A	+/- Leave Corrections	Modified Gap
TL88	413	Time, Labor, & Leave A	equals Ending Leave Balance	Modified Gap
TL88	414	Time, Labor, & Leave A	NOTE: Applicable the leave types.	Modified Gap
TL92	418	Time, Labor, & Leave A	A notification of pending Request and Authorization for Leave action will be delivered to the supervisor and, if applicable, HR through an alert on the system and through e-mail.	Fit
TL93	419	Time, Labor, & Leave A	The system will provide options that an employee can select while completing a Request and Authorization for Leave. The options will allow an employee to determine whether to be notified via e-mail when a supervisor approves and/or disapproves that request.	Gap
TL95	421	Time, Labor, & Leave A	The system will generate a Request and Authorization for Leave for each encumbrance for the current period that has not already been associated with a Request and Authorization for Leave. It will allow the employee to change the details and will notify the supervisor during the approval process of any such changes. See Processes - Leave Requests for business rules related to completing the Request and Authorization for Leave.	Gap
TL96	422	Time, Labor, & Leave A	The system will allow the employee to review any Request and Authorization for Leave already in the system for the period covered and allows any necessary changes to be made. The system will notify the supervisor during the approval process of any changes made to Request and Authorization for Leave which has been approved (or disapproved) by the supervisor. See Processes - Leave Requests for business rules related to completing or changing the Request and Authorization for Leave.	Gap

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
TL98	424	Time, Labor, & Leave A	The system will support the ability for an employee to certify time on a daily basis. Supervisors will be provided with a means to monitor which staff have and have not certified their time.	Fit
TL99	425	Time, Labor, & Leave A	The system will notify the supervisor by providing a list of employees or a report and/or by e-mail of any employee who is likely to incur any overtime. The system will use the DHS Weekly Time Report, the Request and Authorization for Leave, and leave encumbrances for this purpose.	Fit
WM01	000	Workflow Management	System workflow management must Provide ability to establish customized electronic routing functions for each electronic document (purchase requisition, timesheet) for routing to authorized parties for review and approval.	Fit
WM03	000	Workflow Management	Workflow must be fully-integrated with security to ensure that only staff properl authorized to review and approve work in workflow queue are allowed to do so and that any rules established to enforce required, optional, and prohibited data entry during particular workflow steps are consistent with user security profiles	Fit
WM04	000	Workflow Management	be integrated with the human resources module to ensure that staff are removed from the review and approval process based on qualifying events (termination from agency, transfer to another organizational entity within the agency).	Fit
WM05	000	Workflow Management	Workflow should Provide a minimum of fifteen levels of agency-defined approvals.	Fit
WM06	000	Workflow Management	Workflow should be integrated with the Agency's electronic mail system or alert "reviewer" of documents awaiting approval through other means.	Fit
WM08	000	Workflow Management	Workflow should Provide reviewer with a scrollable "picklist" of documents that have been forwarded for approval. Each document can then be selected from the picklist for review and approval.	Fit
WM08	200	Workflow Management	Workflow should support the sorting of the picklist by user defined criteria.	Fit
WM09	001	Workflow Management	Workflow should allow reviewer to:	Fit
WM09	002	Workflow Management	Approve the document and automatically forward it to the next appropriate level as determined by the established approval route record for the document.	Fit
WM09	003	Workflow Management	Reject the document and log reason(s) for disapproval. The then allow the reviewer to route the document back to the appropriate party for rework or cancel (with a default to the document's originator). Regardless of routing steps taken, originator must be notified of any changes made in the approval process.	Gap
WM09	004	Workflow Management	Suspend processing (place on hold until one of the above two actions is taken).	Fit
WM10	000	Workflow Management	Workflow should allow document to automatically post once it has received all required approvals.	Fit
WM11	000	Workflow Management	Workflow should Provide the ability to establish levels of "re-approval" for those documents rejected or routed for "rework".	Gap
WM12	000	Workflow Management	Workflow should Provide an electronic notepad for reviewers to draft notes related to the approval/rejection of documents. These notes must be automatically routed with the document to the next step in the approval process.	Gap
WM13	000	Workflow Management	Workflow must Provide an audit trail of electronic approvals, including approval date, approval time, approver user ID, approval action, and authorized back-up reviewers associated with document approvals.	Fit
WM14	000	Workflow Management	Workflow must Provide online inquiry into the status and location of specific documents, including documents that have been archived (until purged). Provide a message that "document has been purged" when inquiring on purged documents. Inquiry capability should support the ability for authorized agency central administrative staff to inquire on documents that have not received all approvals in the programs.	Gap
WM15	000	Workflow Management	Workflow should provide the ability to temporarily reroute documents from one reviewer's queue to another back-up reviewer if the primary reviewer is known to be unavailable. support the designation of two (2) back-ups for each primary reviewer and each approval step.	Fit

Req No	Seq No	Functional Area	Requirement Text	Fit or Gap
WM16	000	Workflow Management	Workflow should provide time controls for the routing process to ensure timely review and actions are taken for documents, and should provide for alternative routing to designated back-up reviewers after a user-defined period of time.	Fit
WM17	000	Workflow Management	Workflow should Provide ability to "tag" a specific document for "priority" or "urgent" processing; such documents should follow different routing time controls.	Gap
WM19	000	Workflow Management	Workflow should support electronic routing of documents that have no approval requirements.	Fit
WM20	000	Workflow Management	Provide ability to "drilldown" from workflow header information to a detail transaction screen that supports the document, and vice versa.	Fit
WM21	000	Workflow Management	Workflow should generate document turnaround statistics and aging information for management workflow analysis.	Fit
WM22	000	Workflow Management	Workflow should produce exception reports on documents that remain in a status beyond the normal length of time (user-defined).	Fit
WM23	000	Workflow Management	Provide ability to inquire on workflow activity for current fiscal year and two (2) prior years.	Fit
WM99	201	Workflow Management	The system should notify Human Resources or Accounting of actions that have been initiated but have not received required approvals within an agency specified number of workdays.	Fit
WM99	203	Workflow Management	System should provide an automatic notification ability to designated departments of certain events. (For Hire: notify benefits coordinator, payroll administrator and training administrator.)	Fit

Total Requirement Count   1814